



I N T E R W O V E N

TeamSite® Author's Guide

Release 5.5.1

for the Windows NT® and Windows® 2000 Operating Systems

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I N T E R W O V E N

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Chapter 1

Introduction

About This Manual

The *TeamSite Author's Guide* introduces you to the day-to-day operations of TeamSite. It contains detailed instructions for all the functions that can be performed at the Author level, and is primarily intended for Authors. Editors and Administrators should refer to the *TeamSite User's Guide*. Masters and Administrators should also refer to the *TeamSite Administration Guide*.

This manual refers to the version of TeamSite that runs on the Windows NT[®] and 2000 server platform. The client platform—your own computer—may be any one of Windows[®] 95, 98, or NT; Macintosh[®]; or several types of UNIX. For more information on supported client platforms, see the “Getting Started” chapter of this manual.

This manual assumes that you have a basic understanding of your computer and that you are familiar with basic commands such as opening and closing files. It also assumes that you are familiar with the World Wide Web or your company's intranet, that you have some experience using a web browser, and that you have some knowledge of editing Web site files.

Notation Conventions

This manual uses the following notation conventions:

Boldface text represents the exact text that appears in a GUI element (such as a menu item, button, or element of a dialog box). For example:

Click the **Edit File** button in the Button Bar.

Monospaced text represents command-line output, or file names. For example:

The `iwextattr` command-line tool allows you to set and look up extended attributes on a file.

Monospaced italic text represents a command-line variable. The commonest example of this is *iw-home*, which refers to the directory where TeamSite is installed. For example:

`iw-home\etc\iw.cfg`

is the path to the main TeamSite configuration file, `iw.cfg`, which is located in the `etc` directory under the TeamSite installation directory.



`iwckrole role user`

means that you must insert the values of *role* and *user* yourself.

Monospaced bold text represents user input. The > character that appears before a line of user input represents the command prompt, and should not be typed. For example:

`http://TeamSite_hostname/iw`

means that you must enter the above text as represented, inserting the your TeamSite hostname in place of the italicized text.

Square brackets [] surrounding a command-line argument mean that the argument is optional.

A | character separating command-line arguments means that only one of the arguments should be used.

Overview


About TeamSite Areas

Workareas

A *workarea* is a virtual copy of the entire Web site. Contributors can create content within workareas and see their changes within the context of the Web site without affecting the actual site or the work of contributors in other workareas. Users who have access to a

workarea can modify files within that workarea and view their changes within the context of the entire Web site before integrating their work with that of other contributors (this process is known as SmartContext™ QA). Users can lock files in each workarea, eliminating the possibility of conflicting edits.

All changes that are made to files in a workarea are kept completely separate from other workareas and the staging area until the user chooses to promote his changes to the staging area. Within a workarea, users can add, edit, or delete files, or undo changes to files without affecting users in other workareas.

A Web site may have one workarea or many, and there may or may not be several users with access to a workarea. Workareas are depicted in TeamSite with the  icon.

Staging Areas

A *staging area* is where the work of different contributors is coordinated. Contributors can submit the contents of their workareas to the staging area to confirm that their work is well-integrated with that of other contributors.

When Authors edit files, they are submitted to the staging area after an approval step.

About TeamSite Workflow

TeamSite workflow contains two major elements: jobs and tasks.

A *job* is a set of interdependent tasks. Each job describes the particular route that the workflow needs to take. Authors cannot create new jobs, but they may own parts of jobs, or *tasks*.

A task is a unit of work performed by a single user or process. Each task in a job is associated with a particular TeamSite workarea and carries a file or set of files with it.

TeamSite workflow begins when a user creates a job. The user who creates the job specifies the parameters of this job, such as the users who are to perform specific tasks, the workarea a task is to take place in, and the files associated with a task.

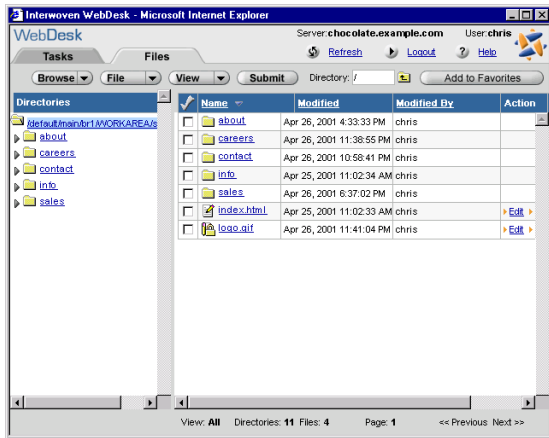
The users who are assigned specific tasks may be notified by email (depending on your system's configuration) or by checking their Task list in the TeamSite GUI.

When users complete tasks, they send the tasks to the next step of the workflow process by selecting a task transition. If the task is a decision point, they will need to select from the possible transitions.

Chapter 2

Getting Started

TeamSite's graphical user interface (GUI) gives you full access to TeamSite through a simple browser-based interface. The GUI is used to perform all functions specific to TeamSite, as well as some general file management functions such as creating new files and directories. The GUI is also used to edit files and perform in-context QA.



The TeamSite window, displaying a workarea in the Files tab

This chapter explains about:

- Choosing a browser (see page 5)
- Logging in to TeamSite (see page 6)
- The LaunchPad applet (see page 7)
- Invoking and configuring the LaunchPad applet (see page 7)
- Logging out of TeamSite (see page 15)

Choosing a Browser

The TeamSite GUI runs under a browser such as Netscape Navigator, Netscape Communicator, or Microsoft Internet Explorer. TeamSite's thin-client interface does not require you to install any other client software unless you will be editing files through the TeamSite GUI. If you will be editing files, you will need to configure a small utility called LaunchPad (see page 7).

The following table shows compatibility for most popular browsers on all supported client platforms:

	Netscape	Internet Explorer
Windows 95, 98, and NT	4.7x	4.x-5.5 ²
Windows 2000	4.7x	5.0-5.5 ²
UNIX	4.7x	Not supported
MacOS	4.7x ¹	5.0

1. Interwoven Merge not supported on Netscape for MacOS.
2. Some versions of Internet Explorer 5.5 do not include the Java Virtual Machine. If you do not have the Java Virtual Machine you can download it from Microsoft's Web site at www.microsoft.com.

Setting Browser Encoding

If you are using Netscape and you need to use international characters in file names, you will need to manually specify the encoding for TeamSite. If you are using Internet Explorer or if you do not need to use international characters, you do not need to do this step.

To specify the encoding to use:

1. In Netscape, select **Edit > Preferences**.
2. Click the **Fonts** option in the left pane.
3. In the **For the Encoding** menu choose Unicode.

4. Set the variable width and fixed width fonts to fonts that support the language you want to view TeamSite in.
5. Choose **Use my default fonts, overriding document-specific fonts**.
6. Click **OK**.

Before you log in:

1. Select **View > Character Set > UTF-8**.
2. Select **View > Character Set > Set Default Character Set**.
3. Select **View > Character Set > UTF-8** again.

Logging In to TeamSite

1. Access TeamSite through your browser:
`http://TeamSite_hostname/iw/`
2. The TeamSite login screen will appear.
3. Select your user type (Author) using the pull-down menu.
4. Select the interface you want to use: WebDesk or WebDesk Pro. WebDesk is the updated interface for TeamSite, and it provides superior ease of use and an updated look and feel. WebDesk Pro is provided for users who are familiar with earlier versions of TeamSite, although these users are encouraged to switch to WebDesk.

5. Enter your username and password, and select your Domain from the pull-down menu.
6. Click **Login**.



TeamSite login screen

7. The TeamSite window will appear.

In future logins, TeamSite will “remember” your latest settings (role, username, and domain) through a cookie it sets on your computer.

About LaunchPad

If you are going to edit files or view them in an editing application, you need to use LaunchPad. LaunchPad is a helper applet that appears in your browser. .

LaunchPad allows you to make associations between file types and the editing applications you want to use. For example, your computer may automatically be configured to always open HTML files in a browser. You can configure LaunchPad so that when you edit an HTML file through the TeamSite GUI, it will open in your editing application instead.

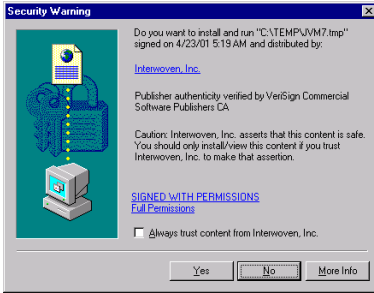
Note: If you have previously used the LaunchPad application and are now using the applet, you must re-set your preferences.

Invoking the LaunchPad Applet

LaunchPad will be invoked automatically the first time you do something in TeamSite that requires LaunchPad, such as editing or importing files. LaunchPad is available for:

- Windows 95, 98, NT, or 2000
- Macintosh
- UNIX

The first time you edit a file through TeamSite, your browser will display a dialog box asking whether or not you want to give permission to run the LaunchPad applet. Click **Yes**.



The LaunchPad permission dialog box (Windows)



The LaunchPad permission dialog box (Macintosh)

If you click the “Always trust” check box, this dialog box will not appear again.

Configuring the LaunchPad Applet

When you edit, view, create, or import a file, TeamSite will start LaunchPad. You do not need to start LaunchPad manually unless you are configuring it.

LaunchPad has several options that allow you to customize the way that you work. For example, you will need to configure which file types are associated with your editing

applications. To configure file types for Windows 95, 98, NT, or 2000 client platforms, see page 8. To configure file types for Macintosh or UNIX client platforms, see page 10.

You can also configure whether you edit files locally or remotely. You can choose to use Direct Edit, where you edit files directly on the server, or Remote Edit, which downloads files to your computer where you can edit them, then upload them to the server through LaunchPad.

Configuring File Types for Windows 95, 98, NT, or 2000

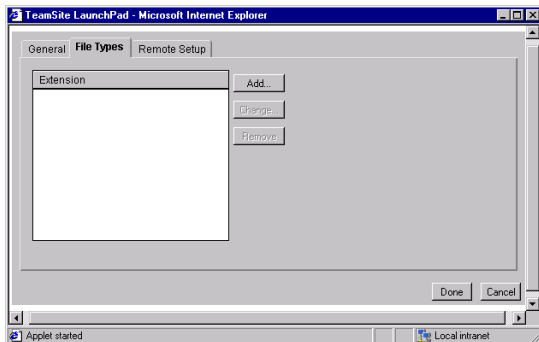
Windows associates different applications with different file types, so that when you double-click on a file, it knows what application to use to open it. You will only need to configure LaunchPad preferences for file types if they are *different* from your Windows preferences. For example, you may have a particular graphics editor set to open JPEG files in your Windows preferences, and want to use the same graphics editor to open JPEGs from TeamSite, as well. In that case, you would not need to set preferences for JPEGs in LaunchPad.

However, you may have a browser set to open HTML files in your Windows preferences, but you may want to use a text editor or a WYSIWYG editor to open HTML files from TeamSite. In that case, you would need to set preferences for HTML files in LaunchPad.

Adding a New File Type

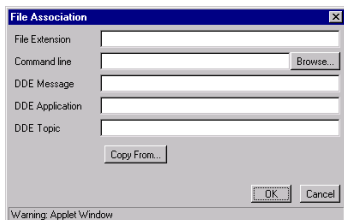
To add a new file type to your LaunchPad preferences:

1. Select **View > Configure LaunchPad**. The LaunchPad applet will appear as part of the TeamSite window.
2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.



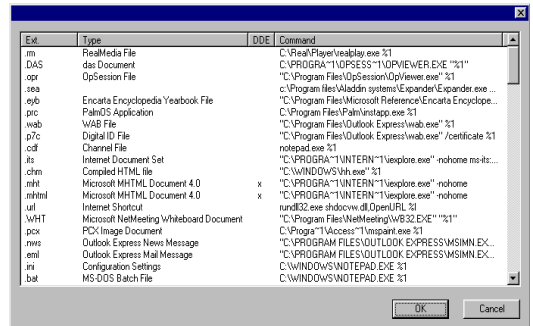
LaunchPad applet preferences: File Types tab

3. Click the **Add** button. An empty File Association window will appear.



File Association window

4. Unless you are familiar with DDE settings for your editing application, it is usually safest to copy all necessary information from an existing setting. Click the **Copy From** button.
5. An Extensions window will appear. Scroll down until you find an entry that uses the editing application that you want to use. Click the extension within that entry, then click **OK**.



Extensions window

6. All the necessary information will be copied into the File Type window. Edit the **Description of type** and the **Associated extension** boxes as necessary. The file extension must begin with a period (for example, .html, .jpg, .gif).

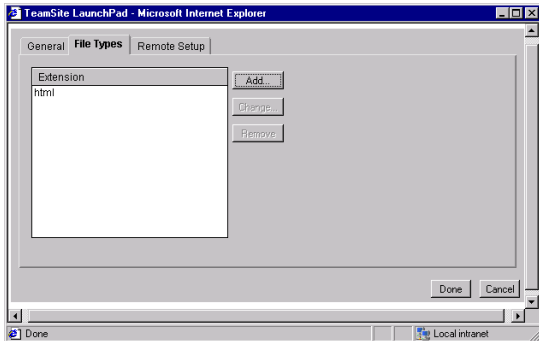
Note: You can only configure one extension per entry. For example, although you might want to use the same editor for .htm and .html files, you would still need to create two different entries.

7. Click **OK**.
8. The new file type will appear in the File Types window. Click **OK**.

Editing File Types

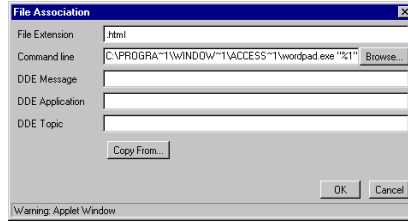
To change the settings for an existing entry:

1. Select **View > Configure LaunchPad**. The LaunchPad applet will appear as part of the TeamSite window.
2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.
3. Select the file type you want to change.



LaunchPad applet preferences: File Types tab

4. Click **Change**. The File Association window containing the settings for that file type will appear.



File Association window

5. From the File Association window, you can change settings using the **Copy From** button, as described above, or you can edit them manually. Click **OK**.
6. The edited file type will appear in the File Types window. Click **Done**.

Configuring File Types for Macintosh or UNIX

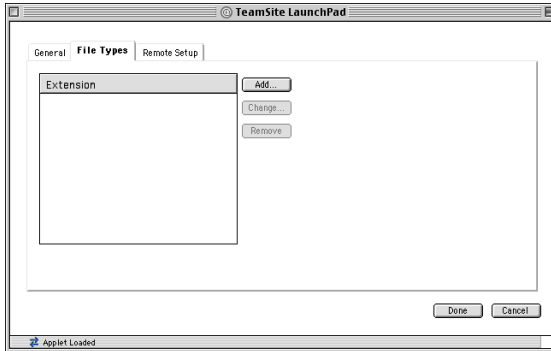
LaunchPad allows you to associate different applications with different file extensions, so that when you double-click on a file, it knows what application to use to open it. For example, if you plan to edit HTML files, you will need to configure the .html or .htm file type.

Adding a New File Type

To add a new type of file to your LaunchPad preferences:

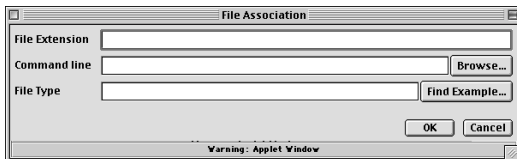
1. Select **View > Configure LaunchPad**. The LaunchPad applet will appear as part of the TeamSite window.

2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.



LaunchPad applet preferences: File Types tab

3. Click **Add**. An empty File Association window will appear.



File Association window

4. Enter the file extension you want to configure in the **File Extension** box. The file extension must begin with a period (for example, .html, .jpg, .gif).

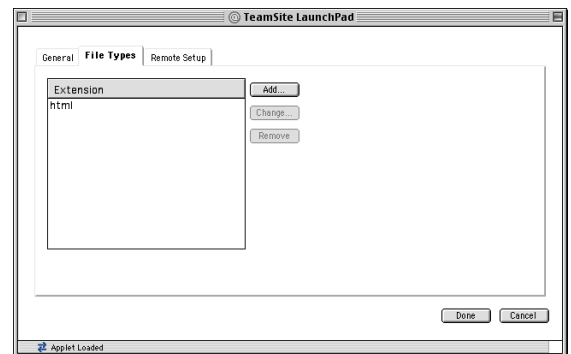
Note: You can only configure one extension per entry. For example, although you might want to use the same editor for .htm and .html files, you would still need to create two different entries.

5. Click **Browse**. In the pop-up window, browse to the location of the application you want to use. Select the application and click **Choose**.
6. Click **OK**. The new file type will appear in the File Types window.

Editing File Types

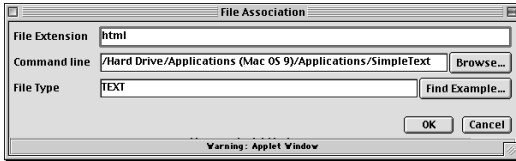
To change the settings for an existing entry:

1. Select **View > Configure LaunchPad**. The LaunchPad applet will appear.
2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.



LaunchPad applet preferences: File Types tab

3. Select the file type you want to change and click **Change**. The File Association dialog box will appear.



File Association window

4. Click **Browse**. In the pop-up window, browse to the location of the application you want to use. Select the application and click **Choose**.
5. Click **OK**. The edited file type will appear in the File Types window.

Direct Edit: Saving Files Directly to the Server

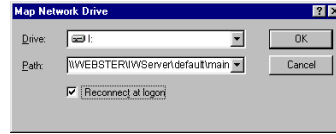
You can use this option if you are using Windows and can access the TeamSite server on your LAN, or if you are using UNIX. Direct Edit is not recommended for Macintosh users.¹

To use Direct Edit:

1. (Windows only)

Using Windows Explorer, map your TeamSite server to a shared network drive. In the Path field, type in the directory for your main branch (for example, `\\SERVERNAME\IWServer\default\main`).

1. Certain Macintosh applications are incompatible with LaunchPad Direct Edit due to differences in the way they handle file types. Text editors such as BBEdit and SimpleText will usually work with Direct Edit for the Macintosh.

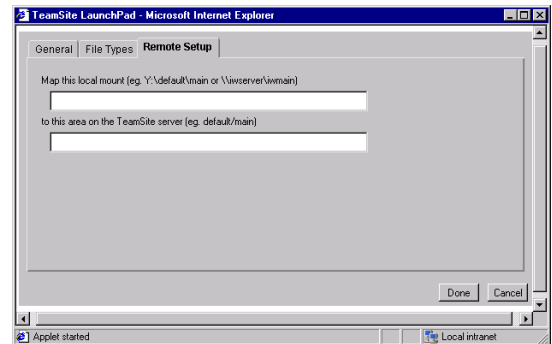


Map Network Drive window

2. (All platforms)

From the TeamSite window, select **View > Configure LaunchPad**. The LaunchPad applet will appear.

3. Select the **Remote Setup** tab.



The Remote Setup tab

4. Enter the local path in the **Map this local mount** box.

For example (Windows client)
`I:\branchpath\WORKAREA\workareaname` or (UNIX client)
`//iwserver/iwmain/branchpath/WORKAREA/workareaname`.

5. Enter the TeamSite path in the “to this area on the TeamSite server” box (for example, `/default/main/branch-path/WORKAREA/workareaname`).

Remote Edit: Editing Files on Your Computer

All users can edit files remotely with LaunchPad. You should use this option if you are using a Macintosh, if you are using Windows and cannot access the TeamSite server through a LAN, or if you use multiple TeamSite servers on a regular basis.

With Remote Edit, when you edit a file, LaunchPad downloads a temporary copy of the file to your local computer. LaunchPad then opens the file in the editing application that you have configured.

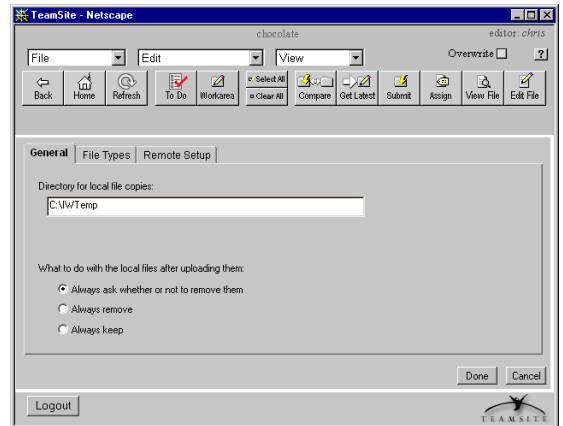
When you have finished editing the file, you must tell LaunchPad to upload the temporary copy to the TeamSite server.

Configuring Remote Edit Preferences

You can tell LaunchPad whether to remove or keep the temporary copies of files that you have edited when you upload these files. To set this preference:

1. Select **Edit > LaunchPad Setup**. The LaunchPad applet will appear.

2. Click the **General** tab. This tab allows you to change the directory for TeamSite temporary files. However, if you change this directory, LaunchPad may not work properly.



Setting preferences in the LaunchPad applet

3. Under **What to do with the temporary local files after uploading them**, select the option that best describes the behavior you want.

If you select **Always remove** or **Always keep** LaunchPad will not query you at the time of upload. **Always remove** only removes the temporary copies of files that LaunchPad has downloaded from TeamSite. It will not affect any other copies of the files that you have on your computer. **Always keep** leaves the temporary files on your computer for further use. You may want to use this option if you want to edit the files

again after uploading them. If you use this option, you will need to remove the files manually at some point.

4. Click the **Remote Setup** tab and clear both fields.

Using Remote Edit

To edit files on your local computer:

1. From the TeamSite window, select **View > Configure LaunchPad**. The LaunchPad applet will appear.
2. Select the **Remote Setup** tab.
3. Clear both fields.

Future edits will download a temporary copy of the file to your computer and automatically open it in the editing application that you have configured LaunchPad to use. You will then need to upload the file for your changes to show up in TeamSite.

If you have closed a file or quit your editing application, and you want to edit the file again:

1. Click the file name in the LaunchPad window.
2. Click **Edit**.
3. The file will open in your editing application.



Using a Different Editing Application

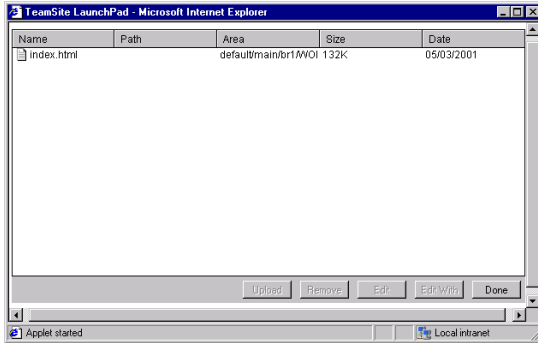
You can also choose a different editing application than the one you have set in your LaunchPad Preferences:

1. Click the file name in the LaunchPad window.
2. Click **Edit With**.
3. A browsing window will appear. Browse your computer until you locate the editing application that you want to use, and click its name.
4. Click **OK**. The file will open in the application that you have chosen.

Uploading Files

LaunchPad permits you to upload the files you have edited to the TeamSite server whenever you are connected to the TeamSite server.

A file that has been edited since it was last uploaded will be displayed in the LaunchPad window with a  (Changed) icon. A file that has not been edited, or that has been uploaded since it was last edited, will be displayed with an  (Unchanged) icon.



Viewing local files through the LaunchPad applet

To upload files:

1. Save your changes.
2. In the TeamSite GUI, select **View > List Local Files** and click the names of the files you want to upload.
3. Click **Upload**.
4. A dialog box will appear asking if you want to delete the copy of the files on your hard disk. If you want to continue editing the files, click **Keep**. If you are finished with the files, click **Remove**. To cancel the operation and close the dialog box, click **Cancel**.
5. TeamSite will upload the files you have just edited to the TeamSite server.

If you are finished with the files that appear in the LaunchPad window and do not want to

upload them, you can delete them from your hard disk without uploading them first:

1. Click the file names in the LaunchPad window.
2. Click the **Remove** button.

Logging Out of TeamSite

When you have finished your work and want to log out of TeamSite, click the **Logout** button in the lower left corner of the TeamSite window. A confirmation dialog box will appear.



Logout Confirmation window

Click **OK**. TeamSite will log you out and return you to the login screen.

Chapter 3

About the TeamSite GUI

TeamSite 5.0 allows Authors to access the TeamSite GUI in two ways: WebDesk and WebDesk Pro. WebDesk is the updated interface for TeamSite, and it provides superior ease of use and an updated look and feel. WebDesk Pro is provided for users who are familiar with earlier versions of TeamSite, although these users are encouraged to switch to WebDesk.

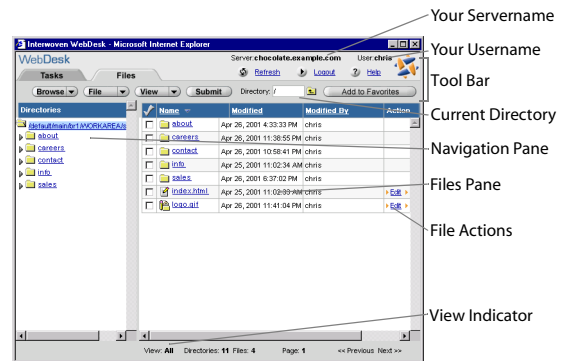
Most of this manual contains information about WebDesk. For information about WebDesk Pro, see Appendix B, “Using WebDesk Pro.”

WebDesk has two main views: the Tasks tab, which displays information about jobs and tasks, and the Files tab, which allows you to navigate through TeamSite areas. In the Tasks tab, you can learn about your jobs and tasks. To view the details of an individual job or task, click its underlined name.

You can move from the Tasks tab to the Files tab by clicking the **Files** tab. TeamSite will display a list of workareas that are available to you, or of the Web site files within a workarea.

In the Files tab, the left-hand pane allows you to navigate through your current view. The

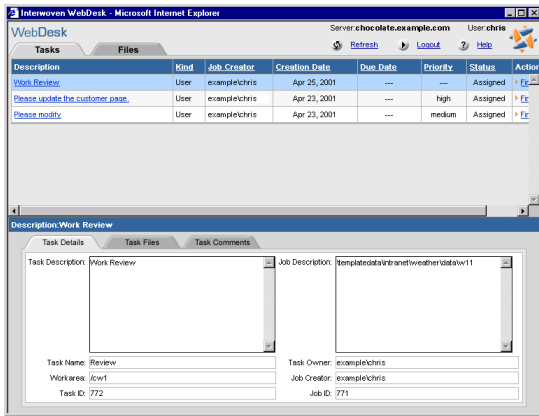
right-hand pane will be updated as you navigate through the system. The top of the screen contains a Tool Bar that contains buttons and menus that allow you to access all available TeamSite commands. To return to your Task list, click the **Tasks** tab.



WebDesk, displaying a workarea in the Files tab

Using the TeamSite Tasks Tab

The TeamSite Tasks tab allows you to track your current tasks, get information about a task, see what files make up a task, and add comments to a task. To see your tasks, click the **Tasks** tab.



A Task list

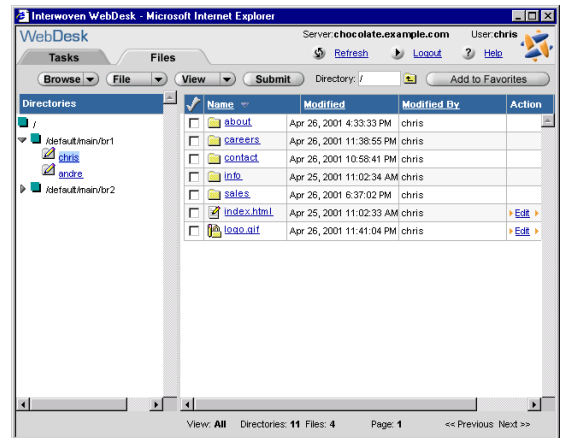
To go to the Files tab, click the **Files** tab.

For more information about the functionality available in the Tasks view, see Chapter 5, “Managing Tasks.”

Using the TeamSite Files Tab

The right-hand side of the TeamSite window contains a list of files and directories. The left-hand side helps you to navigate.

To see a list of your available workareas, select **Browse > Workareas**. When you click the name of a workarea, you will be taken to the Directory view of that workarea. To see which view you are currently in, look at the blue bar at the top of the navigation pane.



Choosing a workarea

To see the contents of a workarea, directory, or file, click its name or icon (files will display in a new browser window). To perform any other operation on a file or directory, click one of the links next to the file or directory, or select the check box next to the file or directory's name, then select the action you want to perform from one of the buttons or

menus in the Tool Bar. To go to a list of recently viewed directories, select **Browse > Recent**.

You can filter your view to see only modified or locked files, or files that you are currently editing. To filter your view, select one of the options in the **View** menu. To see whether your view is filtered, look at the indicator at the bottom of the page.

In a workarea, files and directories may be displayed with several different icons. Each icon contains information about that file or directory's status. See "TeamSite Icon Reference" on page 43 for a complete list of TeamSite icons.

You may sometimes need to refresh WebDesk to see changes that have been made. To do this, click the **Refresh** button in the Button Bar.

To return to your Task list, click the **Tasks** tab.

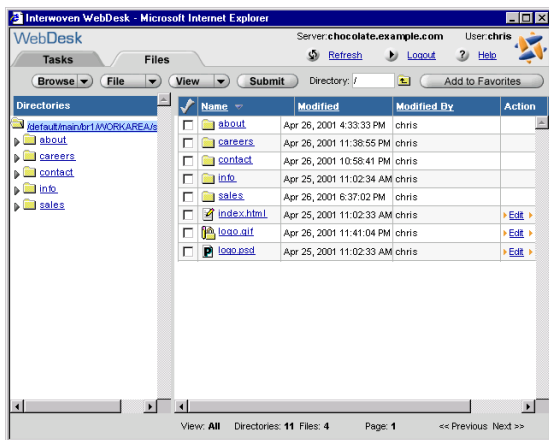
Setting Favorites

TeamSite allows you to keep a collection of frequently visited directories as a shortcut to navigating the directory structure of your Web site. To add a directory to this list:

1. In the TeamSite GUI, navigate to the location that you want to add to your Favorites list.
2. Click the **Add to Favorites** button in the Tool Bar. The current directory will be added to the list.

To view your Favorites list, select **Browse > Favorites**. Your Favorites list will appear in the Navigation pane.

To remove a directory from your Favorites list, go into that directory and click **Remove from Favorites**.

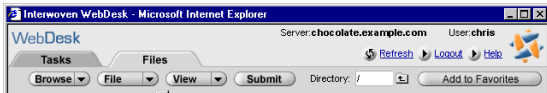


A workarea containing modified, locked, and private files

TeamSite GUI Elements

The Tool Bar

The Tool Bar is part of the Files tab, and it contains several buttons and menus that allow you to use TeamSite functions.



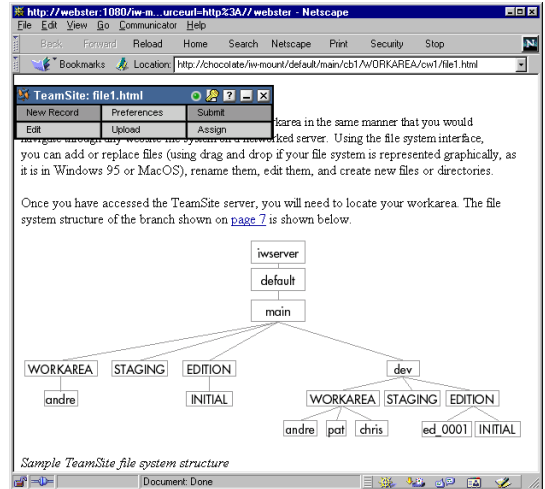
WebDesk Tool Bar

The Tool Bar contains three drop-down menus: **Browse**, **File**, and **View**. The **Browse** menu allows you to control which items appear in the left-hand pane. The **View** menu lets you control which items appear in the right-hand pane. The **File** menu allows you to perform actions on files and directories.

The Tool Bar also contains several buttons. These buttons allow you to submit files for approval, refresh the screen, log out, access online help, and add your current directory to a list of favorites. You can also find information about your current directory in the Tool Bar.

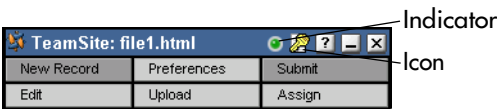
The SmartContext Editing Tab

When you click the name of a file in the TeamSite GUI, the file will appear in a new browser window containing the TeamSite SmartContext Editing (SCE) tab. This tab displays information about the current status of the file shown in the browser window. The buttons on this tab allow you to edit the current page.



A browser window with the SmartContext Editing tab

The SmartContext Editing tab contains an icon and an indicator which tell you about the file's status. The icon tells you whether the file has been modified or locked. The indicator tells you whether or not you can edit the file.



The SmartContext Editing tab


Indicator	Status
Black	You cannot modify this file; it is locked or you do not have permission.
Green	You can modify this file.
Yellow	You can modify this file, but a newer version is in the staging area.
Red	You can modify this file, but it is in conflict with the staging area.

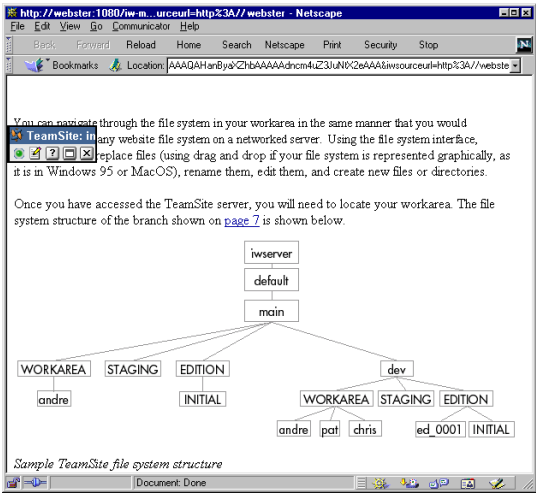
To learn more about the file’s status, move your mouse arrow over the icon. A ToolTip will appear with more detailed information.

The SmartContext Editing tab contains several buttons. You can configure which buttons appear through the Preferences button. For more information about configuring the SmartContext Editing tab, see “Setting Tab Preferences” on page 22.


Minimizing the SmartContext Editing Tab

If you don’t need to use the SmartContext Editing tab, you can minimize it to reduce its size and loading time. To minimize the SmartContext Editing tab, open the tab and


click the  (Minimize) button. The minimized version of the tab will replace the full version of the tab.



A browser window with the minimized SmartContext Editing tab

To reopen the SmartContext Editing tab, click the  (Maximize) button on the minimized tab.

Closing the SmartContext Editing Tab

To close the SmartContext Editing tab, click the  (Close) button on the tab. To get it back, click the **Back** button in your browser, or return to the TeamSite GUI and click the name of a file.

Moving the SmartContext Editing Tab

To move the SmartContext Editing tab, click on the blue title bar and drag it up or down the left side of the page.

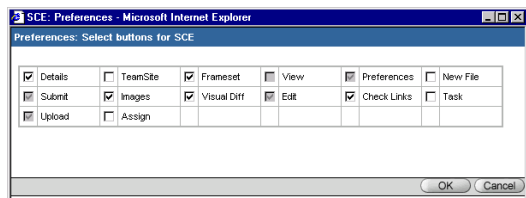
SmartContext Editing and LaunchPad

When you are using SmartContext Editing, if you have LaunchPad set to use Remote Edit, you should configure your LaunchPad to **Always Remove** uploaded files (see page 14). If you do not set this option, the LaunchPad window will rapidly fill up with the files that you edit, and they will not be automatically removed. You can, however, remove these files manually.

Setting Tab Preferences

You can configure which buttons appear in the SmartContext Editing tab. To choose which buttons appear:

1. Click the **Preferences** button in the SmartContext Editing tab. The Preferences window will appear.



The SmartContext Editing Preferences window

2. Click the check boxes for the buttons you want to appear on the tab. Unavailable selections will be grayed out. Certain options such as Assign, Upload, Submit, Edit, and Preferences are always available.

The Casual Contributor Interface

The Casual Contributor interface allows you to click on links in Web pages that will take you to a specific part of the TeamSite GUI. Possible actions are:

- Edit—opens a file for editing.
- SCE—opens a file in a browser for use with SmartContext Editing.

If you have logged in to TeamSite recently enough that your authentication has not expired, you will be taken directly to the appropriate page or part of the TeamSite GUI. Otherwise, you will have to log in again. If you are using WebDesk, you will then be taken to the appropriate part of the TeamSite GUI. If you are using WebDesk Pro, you will be taken to your Home page. The amount of time you have before your authentication expires is configurable by your site administrator.

The appearance and placement of these links is configured on a site by site basis. Consult your site administrator for more information.

Chapter 4

Editing Files

You can edit files in your Task list, or you can navigate into an Editor's workarea to edit files. A new task will be created if you edit a file that is not already in one of your tasks.¹ When you complete this task, the file will be returned to the owner of the workarea for approval.

TeamSite allows you to edit files from the TeamSite GUI in two ways: through SmartContext Editing, where you browse the Web site and edit pages as you view them, or through the main TeamSite GUI, where you browse the directory structure of the Web site and edit individual files.

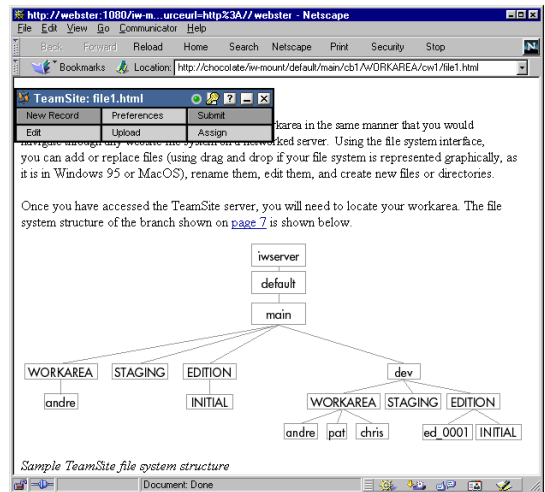
Note: Before you create or edit files with TeamSite, you must set up LaunchPad on your computer. To set up LaunchPad for your platform, select **View > Configure LaunchPad**, or see page 7.

1. This describes the default workflow for Authors. Your system may be configured to allow a different workflow process. For more information on workflow and tasks, see page 14 and page 29.

Using SmartContext Editing

Editing Files Through SmartContext Editing

1. To edit a file using SmartContext Editing, click the name of a file in the Work Window or a Task Details window in the TeamSite GUI. The file will open in a new browser window containing the SmartContext Editing Tab.
2. Navigate through the Web site by clicking links until you reach the page you want to edit.



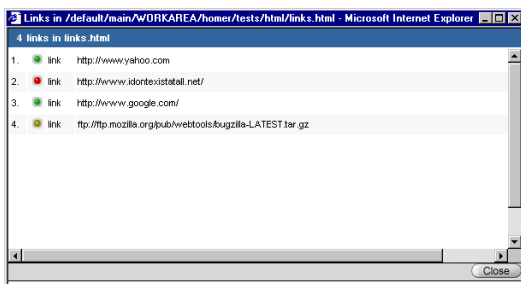
A browser window with the SmartContext Editing tab

3. Click the **Edit** button on the tab. The file will open in your editing application.
4. Edit the file as you normally would. Save the file when you are finished editing it.
5. To see the changes you made, return to the SmartContext Editing window and click the **Upload** button on the pulled-out tab. Your changes will be uploaded at this time.

Checking Links with SmartContext Editing

To check links in your current page:

1. If the **Check Links** button does not appear in the SmartContext tab, use the Preferences button to add it (see “Setting Tab Preferences” on page 22).
2. Click the **Check Links** button. The Links window will appear.



The Links window

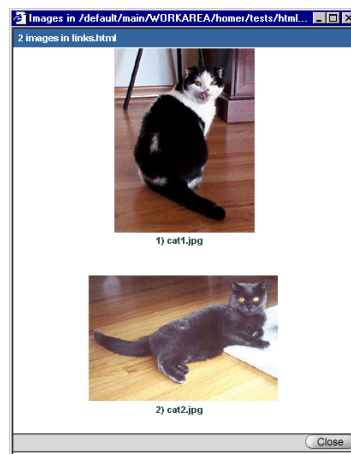
3. This window shows the status of the links that appear on the current page:

Green	The link works.
Red	The link is broken.
Yellow	The link can't be validated as either correct or broken by this link checker.

Editing Images with SmartContext Editing

To edit the images that appear in a page:

1. If the **Images** button does not appear in the SmartContext tab, use the Preferences button to add it (see “Setting Tab Preferences” on page 22).
2. Click the **Images** button on the tab. An Images window will appear, containing all the images that appear on the page.



The Images window

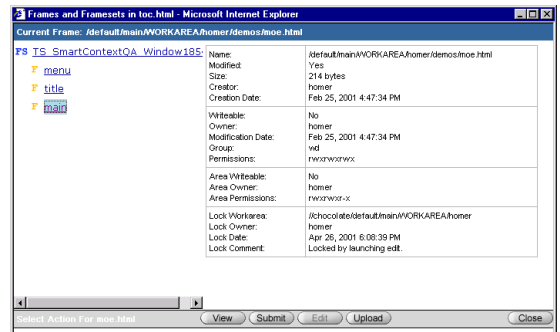
3. In the Images window, click the image you want to edit. A new window will appear, displaying the image and the SmartContext Editing tab.
4. Edit the file using SmartContext Editing (see page 23). Save the file when you are finished editing it.

SmartContext Editing and Framesets

If you are editing a frame-based page, a SmartContext Editing tab will appear in each frame so that you can select which file to edit. However, you can also edit the frameset file itself.

To edit a frame-based page's frameset file:

1. If the **Frameset** button does not appear in the SmartContext tab, use the Preferences button to add it (see "Setting Tab Preferences" on page 22).
2. Click the **Frameset** button on the tab. The Frames and Framesets window will appear with a list of the frameset file and all the files it contains. Frameset files are marked with an FS; files contained within the frameset are marked with an F.



The Frames and Framesets window

- To get information about any of the files listed, click its name.
- To edit one of the files, click its name, then click **Edit**.
- To submit one of the files, click its name, then click **Submit**.
- To view one of the files in its editing application, click its name, then click **View**.
- To upload one of the files you have edited to TeamSite, click its name, then click **Upload**. This will do the same thing as the Upload button in LaunchPad (see page 14).

Editing Files Through the TeamSite GUI

To edit a file through the main TeamSite GUI using your default editing application:

1. In the TeamSite GUI, navigate to the directory containing the file you want to edit.

2. Click the **Edit** link next to the file.

or

Click the check box next to that file and select **Edit > Edit File**.

If you are using LaunchPad's Direct Edit feature (see page 12), changes will appear on the server as soon as you save them. If you are using Remote Edit (see page 14), a temporary version of the file will be downloaded to your computer, and its name will appear in the LaunchPad window. Changes will not appear until you upload the files from LaunchPad.

3. The file will open in your editing application. Edit the file as you normally would. If you are using Remote Edit, you will need to upload the file from LaunchPad after you have saved it.

Editing Files With an Alternate Application

To edit a file using an alternate editing application:

Macintosh and Windows users only:

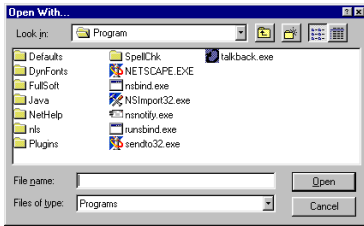
1. Navigate to the directory containing the file you want to edit. Click the check box next to that file.
2. Select **Edit > Edit With**.

An Open With window will appear. Select the editing application you want to use from the list displayed.



The Open With window

If you cannot find the application you want to use, click the **Other** button and navigate to the location of the editing application. Click **Open**.



Locating an editing application

3. The file will open in your editing application. Edit the file as you normally would. If you are not using Direct Edit, you will need to upload the file from LaunchPad after you have saved it.

Viewing Your Work

To view a file within the context of the Web site, click its underlined filename within a workarea, staging area, or edition. The file will appear in a new browser window. You may need to refresh your browser to see changes immediately.

To view your work in context, you may want to view the main page and navigate through the Web site as a visitor would.

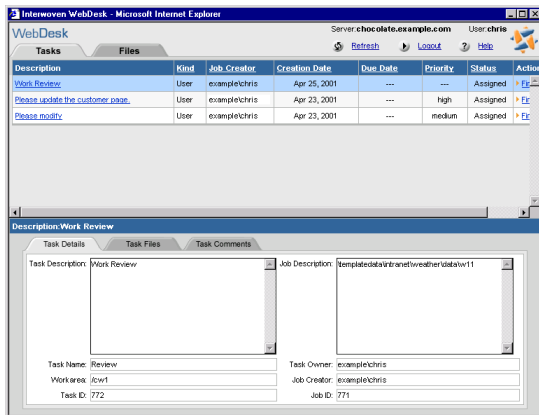
To see the end of the page's URL (for example, if you want to see the name of the displayed file), click the browser's **Location** text box, then press the **End** key. To return to the beginning of the URL, press the **Home** key.

Chapter 5

Managing Tasks

Viewing Your Task List

To see your pending tasks, click the **Tasks** tab. TeamSite will show you all the tasks that are assigned to you.



A To Do list

The **Tasks** tab contains three sub-tabs: **Task Details**, **Task Files**, and **Task Comments**. These sub-tabs allow you to get further information on tasks (see “Viewing Task Information” on page 31), edit and view task files (see “Editing Task Files” on page 30), or add comments to tasks (see “Adding Comments to Tasks” on page 35).

Performing Tasks

TeamSite workflow includes many kinds of tasks. Tasks may require you to add files to the task, edit files or set metadata, or they may be performed by external programs that require no user input. Some tasks may require review and approval or rejection (these tasks are often marked as read-only).

To perform a task:

1. Go to the **Tasks** tab. Click the description of the task you want to perform. The task will be highlighted in blue.
2. Click the **Task Files** sub-tab to see the files attached to the task.
3. The actions you can perform depend on what type of task it is.

If it is an approval task, you will probably need to look at the files attached to the task (see “Approving Tasks” on page 35).

If it is an assignment, you may need to edit files attached to the task (see “Editing Task Files” on page 30).

Some types of tasks are automated. If the **Start** action appears, click it to start the task. Refresh the window to see the new status.

You may also be able to add and remove files (see “Adding and Removing Files from Tasks” on page 31), and add comments to tasks (see “Adding Comments to Tasks” on page 35).

Editing Task Files

To edit a file in a task:

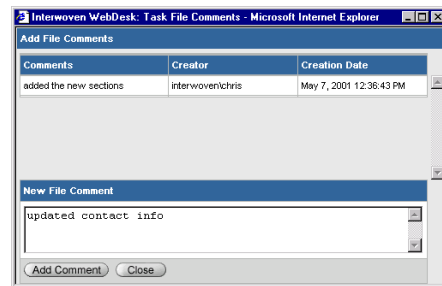
1. Go to the **Tasks** tab. Click the description of the task whose files you want to edit.
2. Click the **Task Files** sub-tab to see the files attached to the task.
3. Click **Edit** in the **Actions** column of the file you want to edit. You can only edit task files when the **Edit** action is available.

For more information on editing files, see page 25.

Adding Comments to Task Files

At any point in a task, you can add information in the form of comments on the files contained in the task. These comments may convey information to other users involved with the job, such as content contributors or approvers.

1. Go to the **Tasks** tab. Click the description of the task you want to add a comment to.
2. Click the **Task Files** sub-tab.
3. Click **Comments** in the **Actions** column of the file you want to add a comment to. The Add File Comment window will appear.



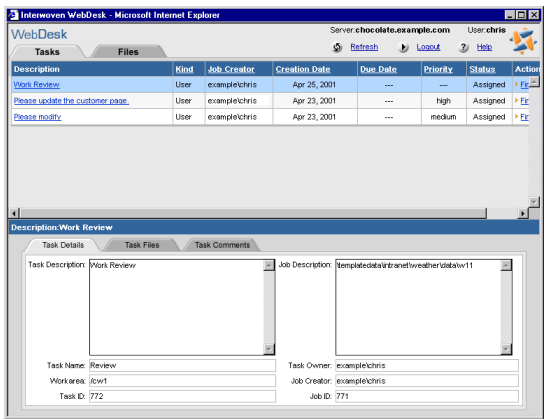
The Add File Comment window

4. Enter a comment in the New File Comment text area.
5. Click **Add Comment**.
6. When you are finished adding comments, click **Close**.

Viewing Task Information

To view task information:

1. Go to the **Tasks** tab. Click the description of the task you want to add a file to.
2. Click the **Task Details** sub-tab to see information about the task, such as the task's description, name, owner, ID, and what workarea it's taking place in. You can also view information about the job the task is a part of, such as its description, creator, and ID.



The Task Details window

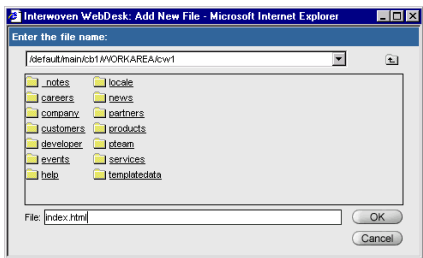
Adding and Removing Files from Tasks

Adding a New File to a Task

You can only add new files to a task when the **New File** button is available in the **Task Files** sub-tab.

To add a new file to a task:

1. Go to the **Tasks** tab. Click the description of the task you want to add a file to.
2. Click the **Task Files** sub-tab to see the files already attached to the task.
3. Click **New File**. The Add New File window will appear.



Add New File window

4. Use this window to navigate to the directory where you want to put the file.
5. Enter the name of the file.
6. Click **OK**.

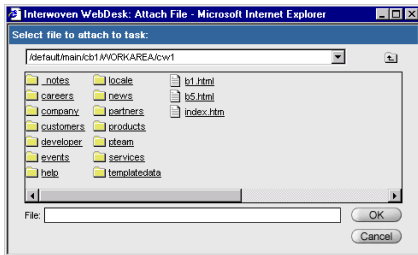
The file will be added to the task, and it will open in your editing application. For more information about editing files, see page 25.

Adding Existing Files to a Task

You can only add new files to a task when the **Attach File** button is available in the **Task Files** sub-tab.

To add an existing file to a task:

1. Go to the **Tasks** tab. Click the description of the task you want to add a file to.
2. Click the **Task Files** sub-tab to see the files already attached to the task.
3. Click **Attach Files**. The Attach Files window will appear.



Attach Files window

4. Use this window to locate the file you want to attach.
5. Click the name of the file.
6. Click **OK**.

The file will be added to the task.

Removing Files from Tasks

To remove a file from a task:

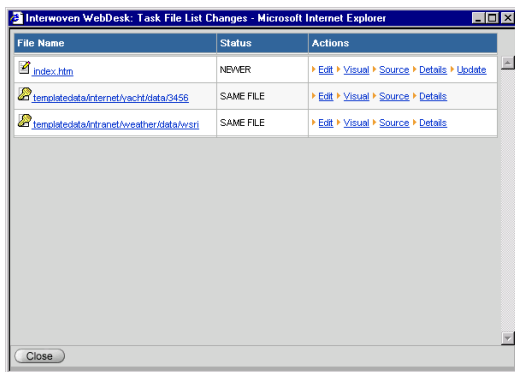
1. Go to the **Tasks** tab. Click the description of the task.
2. Click the **Task Files** sub-tab to see the files attached to the task.
3. Click **Detach** in the **Actions** column of the file you want to remove from the task. You can only detach task files when the **Detach** action is available.
4. A confirmation box will appear; click **OK**.
5. The file will be removed from the task.

Viewing Task Changes

To view the changes that have been made to a task:

1. Go to the **Tasks** tab. Click the description of the task whose changes you want to view.
2. Click the **Task Files** sub-tab.
3. Click **List Changes**. The Task File List Changes window will appear.

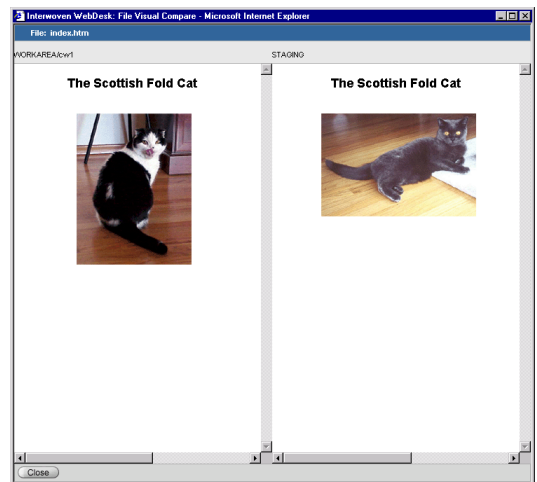
This window contains a list of all current task files, with information about whether they have been modified or not. It also contains a list of actions you can perform on each file.



Task File List Changes window

Visual Comparison of Task Files

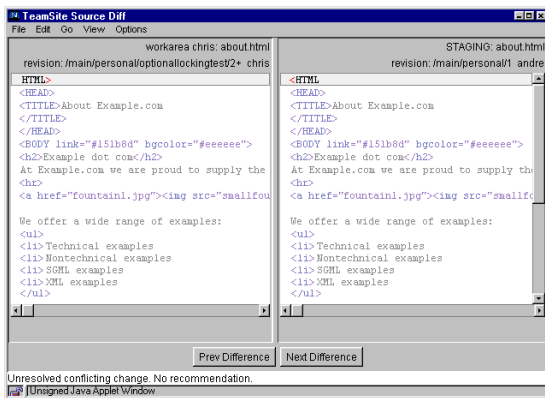
To see the current version of a file in a task side by side with the most recently approved version of that file (the version in the staging area), click **Visual** next to the file in the Task File List Changes window. The two versions will appear side by side, displayed in the context of the Web site.



The File Visual Compare window

Source Comparison of Task Files

To see the current version of a file in a task side by side with the version in the staging area, click **Source** next to the file in the Task File List Changes window. The two versions will appear side by side, displayed as source (for example, HTML).

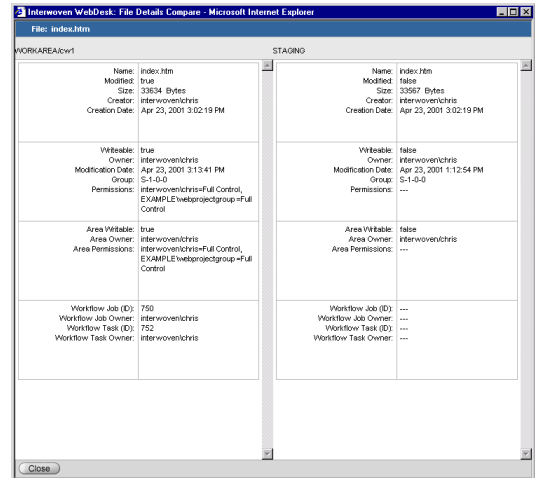


The File Source Compare window

Comparing Details of Task Files

To see the file information about the current version of a file in a task side by side with the information about the version in the staging area, click **Details** next to the file in the Task File List Changes window. The two sets of information will appear side by side.

For more information about file details, see “Viewing File Information” on page 40.



The File Details Compare window

Replacing a File with the Version in the Staging Area

The version of a file that you are editing may be newer or older than the version in the staging area. In either case, you can replace the version that you are working on with the version in the staging area.

Note: If your version is newer, and you choose to replace it, your changes will be lost.

To replace a file with the version in the staging area:

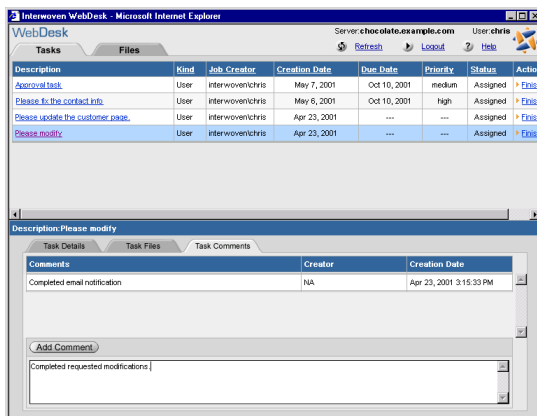
1. Click **Update** next to that file in the Task File List Changes window.
2. A confirmation dialog box will ask you if you want to make this change. Click **OK**.
3. The file will be overwritten with the version from the staging area.

Adding Comments to Tasks

At any point in a task, you can add information in the form of comments. These comments may convey information to other users involved with the job, such as content contributors or approvers.

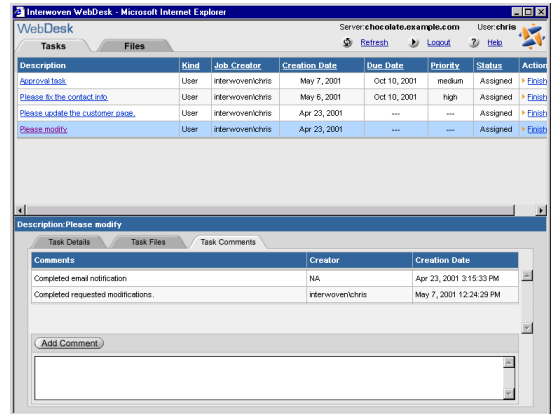
To add a comment to a task:

1. Go to the **Tasks** tab. Click the description of the task.
2. Click the **Task Comments** sub-tab to see the comments already attached to the task.
3. Enter a comment in the **Add Comment** text area.



Adding a task comment

4. Click **Add Comment**.
5. The comment will appear in the list of comments.



The new comment, added to the task.

Approving Tasks

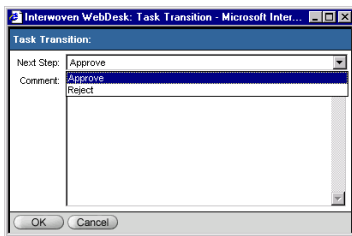
Approval tasks require you to review the files, and then approve or reject them. To view a task file, click its description. To approve or reject the task, select the appropriate successor option (see “Completing Tasks” on page 36). Confirmation of your choice will appear in the TeamSite window.

Completing Tasks

When you have completed a task, select a transition to move the job along the workflow process.

To select a transition:

1. Go to the **Tasks** tab.
2. Click **Finish** in the **Actions** column for the task you want to finish.
3. A Task Transition window will appear.



A Task Transition window

4. Select the transition that best describes what you want to do (for example, approval tasks often have the options **Approve** and **Reject**).
5. Enter a comment in the Comment area.
6. Click **OK**. The job will now move on to the next task.

Some tasks may be retrieved after you have selected a transition (this is only possible if the next task has not been activated). If you want to take a task back, go to your Task list and

click **Restart** in the Actions column for the task you want to take back (if available). If this action is not available, then this task cannot be retrieved.

Taking Ownership of Tasks

You can only take ownership of group tasks, which are created without a specific owner. These tasks will say <no user> in the Owner column of the Job History window.

To take ownership of a task:

1. Go to the **Tasks** tab.
2. Click **Take** in the **Actions** column for the task you want to take ownership of. If this action is not available, you cannot take ownership of the task.

Chapter 6

Managing Files

This chapter explains how to:

- Create new files (page 37)
- Create new directories (page 38)
- Import files into your workarea (page 38)
- Move files (page 39)
- Copy files (page 39)
- View file information (page 40)

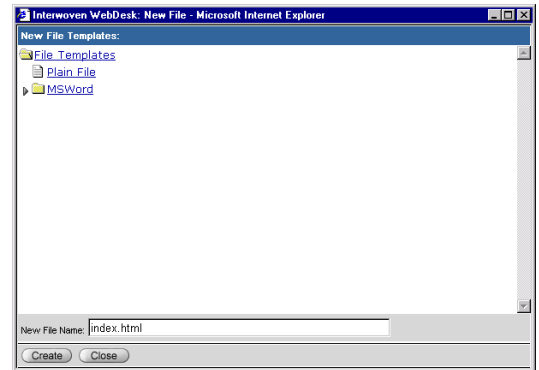
Creating New Files

You can only create new files in directories where you have write permissions.

Before you create or edit files with TeamSite, you must install and configure TeamSite's helper application, LaunchPad (see page 7).

To create a new file in a workarea where you have access:

1. Go into a workarea by clicking its name.
Within the workarea, navigate to the directory where you want to place the new file.
2. Select **File > New File**. The New File dialog box will appear.



The New File window

3. Select the type of template you want to use, then select the specific template that you want to use. If you do not want to use a template, select **Plain File**.
4. In the **New File Name** box, enter the name of the file you want to create. You will need to include the suffix (that is, *file-name.html*). Do not use the following characters in filenames:

\ / : * ? " < > |

If a file with the same name exists in another workarea and is locked, you will not be able to create the file. If a file with this name exists in the staging area, you will be asked whether you want to create a new file or

bring a copy of the file in the staging area into your workarea. Follow the directions in the dialog boxes that appear.

5. Click **Create**.

The file will open in the application associated with its file extension. If you are using Direct Edit (see page 12), changes will be saved to the TeamSite server when you save the file. If you are using Remote Edit (see page 14), its name will appear in LaunchPad, and you must upload it after you have saved it.

Creating New Directories

You can only create directories inside directories where you have write permissions.

To create a new directory in a workarea where you have access:

1. Go into the workarea: select **Browse > Workareas** to see a list of all the workareas where you have access. Click the name of the workarea where you want to create the directory.
2. Within the workarea, navigate to where you want to place the new directory. When you are in a workarea, the **New Directory** command will appear in the **File** menu.
3. Select **File > New Directory**. A dialog box will appear, asking you to enter the name of the new directory.

4. Type the name of the directory you want to create. Do not use the following characters in directory names:

\ / : * ? " < > |

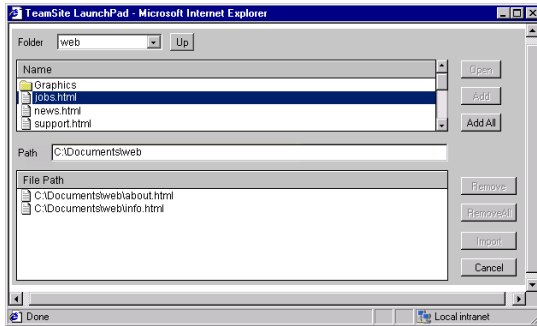
5. Click **OK**. An empty directory will be created.

Importing Files into Your Workarea

TeamSite lets you import files residing on your hard drive into the TeamSite system. You need to have LaunchPad (see “About LaunchPad” on page 7) to import files.

To import a file using the LaunchPad applet:

1. Select **File > Import**.
2. The LaunchPad applet will open within the TeamSite window.
3. Use the **Name** navigation box to browse to the location of your files on your hard drive.
4. Select the file you want to import and click **Add**. The selected file will appear in the list at the bottom of the window. Continue adding files until you are finished.



Importing Files

- When you are finished adding files, click **Import**. Your files will be imported to the TeamSite server.

Moving Files


To move a file from one directory to another:

- Select the check box next to the name of the file that you want to move.
- Select **File > Move**.
- A dialog box will appear asking you for the new name or path. Type the full path of the directory where you want the file to be moved to. Be sure to include the file name in the path. You can use an absolute path (rooted in the workarea's root directory) or a relative path, and you can change the name of the file.

`/htdocs/products/index.html`
would specify an absolute path.

`products/index.html` would specify a relative path.

`../support/index.html` would specify a relative path.

- The file will appear in the new location with a  (Modified) icon.

The version history of the file will keep track of the change in location—older versions of the file will not be lost.

Copying Files


To copy a file from one directory to another:

- Select the check box next to the name of the file that you want to copy.
- Select **File > Copy**.
- A dialog box will appear asking you for the new name or path. Type the full path of the directory where you want the file to be copied. Be sure to include the file name in the path. You can use an absolute path (rooted in the workarea's root directory) or a relative path, and you can change the name of the file.

`/htdocs/products/index.html`
would specify an absolute path.

`products/index.html` would specify a relative path.

../support/index.html would specify a relative path.

4. A copy of the file will appear in the new location with a  (Modified) icon.

Viewing File Information

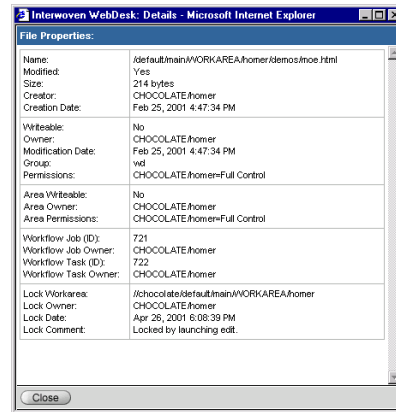
TeamSite's Details feature allows you to view basic information such as:

- The size of a file.
- When it was created and by whom.
- Whether you have write access to it.
- What the permissions are (what users and groups have access to it).
- Whether you have access to the area it resides in.
- The owner and group for that area.
- Whether it is locked (and by whom and in which workarea).
- Whether it is part of a task.
- What comments and metadata are currently attached to it.

To view the properties of a file:

1. Select the check boxes next to the files whose properties you want to view.
2. Select **File > Details**, or click the **Details** link next to a file.
3. The Details window will appear.

Look in this window to find the information you're most interested in.



The File Properties window

About the File Properties Window

Basic

Name	Name of the file
Modified	Tells whether the file has been modified in the current workarea.
Size	Size of the file.
Creator	Username of the creator of the file.
Creation Date	Date the file was created.

File Security

Writeable	Tells whether you can write to the file.
Owner	Owner of the file (according to Windows permissions).
Modification Date	Date the file was last modified.
Group	Group which has access to the file (according to Windows permissions).
Permissions	Access permissions for the file in Windows notation.

Area Security

Area Writable	Tells whether you can edit files in the current workarea.
Area Owner	Owner of the workarea.
Area Permissions	Access permissions for the workarea in Windows notation.

Workflow

Workflow Job (ID)	Name and ID of the job (if any) associated with this file.
Workflow Job Owner	Username of the owner of the job (if any) associated with this file.
Workflow Task (ID)	Name and ID of the task (if any) associated with this file.
Workflow Task Owner	Username of the owner of the task (if any) associated with this file.

Lock

Lock Workarea	Workarea (if any) in which the file is locked.
Lock Owner	Username of the lock owner.
Lock Date	Time the file was locked.
Lock Comment	Comment associated with the lock.


Metadata

Metadata that has been set on this file. Metadata will vary from site to site and from file to file.









Appendix A

TeamSite Icon Reference

TeamSite Areas

-  Backing Store
-  Branch
-  Workarea
-  Staging Area
-  Edition

Files and Directories in TeamSite

-  File
-  Directory
-  Deleted File or Directory
-  Modified File
-  Locked File (locked by you)
-  Modified Locked File
-  Locked File (not available to you)
-  Modified Locked File
-  Private File
-  Private Directory

Appendix B

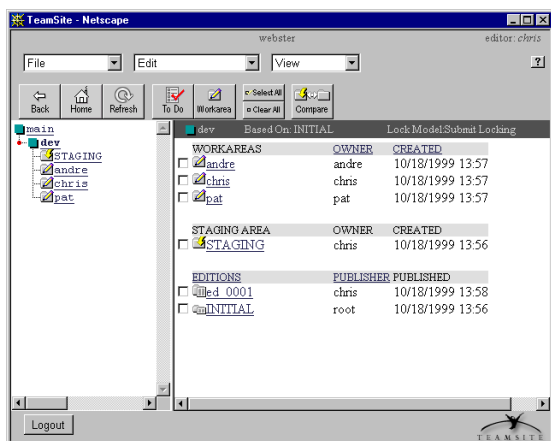
Using WebDesk Pro

This appendix discusses WebDesk Pro, the TeamSite interface provided for users who are already familiar with TeamSite and who choose not to use WebDesk. Topics covered include:

- Getting started (page 46)
 - Choosing a browser (page 46)
 - Logging in to TeamSite (page 46)
 - About LaunchPad (page 47)
 - Invoking and configuring the LaunchPad applet (page 47)
 - Logging out of TeamSite (page 55)
- About the TeamSite graphical user interface (GUI) (page 56)
 - About TeamSite workflow (page 56)
 - Using the Workflow view (page 57)
 - Using the Branch view (page 57)
 - TeamSite GUI elements (page 58)
 - Using the Branch view (page 57)
 - Using the Branch view (page 57)
 - Using the Branch view (page 57)
 - Using the Branch view (page 57)
- Editing files (page 61)
 - Using SmartContext Editing (page 61)
 - Through the TeamSite GUI (page 64)
 - Using the Branch view (page 57)
 - Using the Branch view (page 57)
- Viewing your work (page 65)
 - Browser view (page 65)
 - Source view (page 65)
- Managing tasks (page 66)
 - Viewing your To Do list (page 66)
 - Performing tasks (page 66)
 - Editing task files (page 66)
 - Editing tasks (page 68)
- Managing files (page 72)
 - Creating new files (page 72)
 - Creating new directories (page 73)
 - Importing files into your workarea (page 73)
 - Renaming files (page 74)
 - Moving files (page 75)
 - Copying files (page 75)
 - Viewing file properties (page 76)
 - Searching metadata (page 78)

Getting Started

TeamSite's graphical User interface (GUI) gives you full access to TeamSite through a simple browser-based interface. The GUI is used to perform all functions specific to TeamSite, as well as some general file management functions such as creating new files and directories. The GUI is also used to edit files and perform in-context QA.



TeamSite branch structure, as seen through the GUI

Choosing a Browser

The TeamSite GUI runs under a browser such as Netscape Navigator, Netscape Communicator, or Microsoft Internet Explorer. TeamSite's thin-client interface does not require you to install any other client software unless you will be editing files through the TeamSite GUI. If you will be editing files, you will need to configure a small utility called LaunchPad (see page 47).

Not all TeamSite features are compatible with all browsers on all client platforms. The following table shows compatibility for most popular browsers on all supported client platforms:

	Netscape	Internet Explorer
Windows 95, 98, and NT	4.7x	4.x-5.5 ²
Windows 2000	4.7x	5.0-5.5 ²
UNIX	4.7x	Not supported
MacOS	4.7x ¹	5.0

1. Interwoven Merge not supported on Netscape for MacOS.
2. Some versions of Internet Explorer 5.5 do not include the Java Virtual Machine. If you do not have the Java Virtual Machine you can download it from Microsoft's Web site at www.microsoft.com.

Logging In to TeamSite

1. Access TeamSite through your browser:
`http://TeamSite_hostname/iw/`
2. The TeamSite login screen will appear.
3. Select your user type (Author) using the pulldown menu.
4. Enter your username and password, and select your Domain from the pull-down menu.
5. Click **Login**.



TeamSite login screen

6. The TeamSite window will appear. The view that appears is called your Home page and can be returned to at any time by clicking the **Home** button in the Button Bar. You can set the **Home** button to go to any location in TeamSite where you have access (see page 58).

If you have not set your Home page, TeamSite will show you a list of the jobs that you own. If you are an Author, TeamSite will show you a list of the tasks that you own.

In future logins, TeamSite will “remember” your latest settings (role, username, and domain) through a cookie it sets on your computer.

About LaunchPad

If you are going to edit files or view them in an editing application, you need to use LaunchPad. LaunchPad is an applet which runs in your browser.

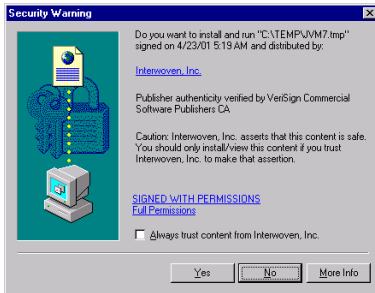
LaunchPad allows you to make associations between file types and the editing applications you want to use. For example, your computer may automatically be configured to always open HTML files in a browser. You can configure LaunchPad so that when you open an HTML file through the TeamSite GUI, it will open in your editing application instead.

Invoking the LaunchPad Applet

LaunchPad will be invoked automatically the first time you do something in TeamSite that requires LaunchPad, such as editing or importing files. LaunchPad is available for:

- Windows 95, 98, NT, or 2000
- Macintosh
- UNIX

The first time you edit a file through TeamSite, your browser will display a dialog box asking whether or not you want to give permission to run the LaunchPad applet. Click **Yes**.



The LaunchPad permission dialog box (Windows)



The LaunchPad permission dialog box (Macintosh)

If you click the “Always trust” check box, this dialog box will not appear again.

Configuring the LaunchPad Applet

When you edit, view, create, or import a file, TeamSite will start LaunchPad. You do not need to start LaunchPad manually unless you are installing or configuring it.

LaunchPad has several options that allow you to customize the way that you work. First, you will need to configure which file types are associated with your editing applications. To configure file types for Windows 95, 98, NT, or 2000 client platforms, see page 48.

To configure file types for Macintosh or UNIX client platforms, see page 50.

You can also configure whether you edit files locally or remotely. You can choose to use Direct Edit, where you edit files directly on the server, or Remote Edit, which downloads files to your computer where you can edit them, then upload them to the server through LaunchPad.

Configuring File Types for Windows 95, 98, NT, or 2000

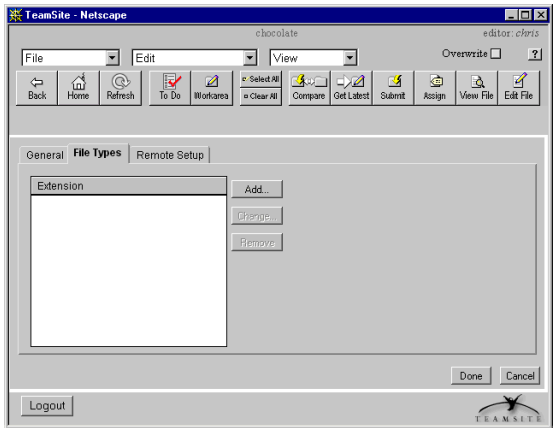
Windows associates different applications with different file types, so that when you double-click on a file, it knows what application to use to open it. You will only need to configure LaunchPad preferences for file types if they are *different* from your Windows preferences. For example, you may have a particular graphics editor set to open JPEG files in your Windows preferences, and want to use the same graphics editor to open JPEGs from TeamSite, as well. In that case, you would not need to set preferences for JPEGs in LaunchPad.

However, you may have a browser set to open HTML files in your Windows preferences, but you may want to use a text editor or a WYSIWYG editor to open HTML files from TeamSite. In that case, you would need to set preferences for HTML files in LaunchPad.

Adding a New File Type

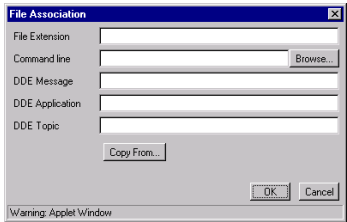
To add a new file type to your LaunchPad preferences:

1. Select **Edit > LaunchPad Setup**. The LaunchPad applet will appear as part of the TeamSite window.
2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.



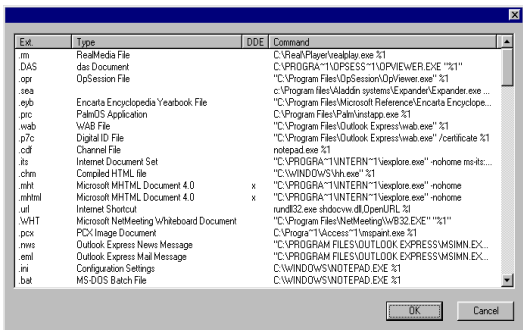
LaunchPad applet preferences: File Types tab

3. Click the **Add** button. An empty File Association window will appear.



File Association window

4. Unless you are familiar with DDE settings for your editing application, it is usually safest to copy all necessary information from an existing setting. Click the **Copy From** button.
5. An Extensions window will appear. Scroll down until you find an entry that uses the editing application that you want to use. Click the extension within that entry, then click **OK**.



Extensions window

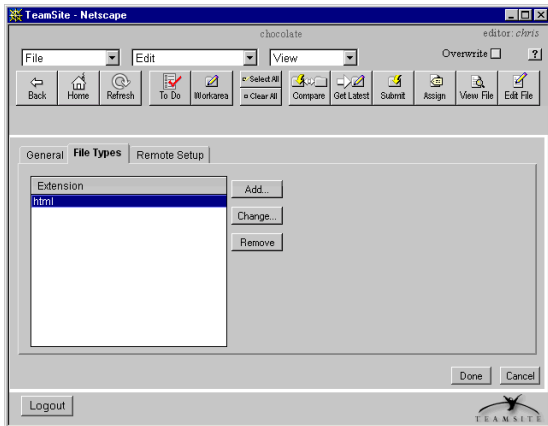
6. All the necessary information will be copied into the File Type window. Edit the **Description of type** and the **Associated extension** boxes as necessary. The file extension must begin with a period (for example, .html, .jpg, .gif).
- Note:** You can only configure one extension per entry. For example, although you might want to use the same editor for .htm and .html files, you would still need to create two different entries.
7. Click **OK**.

8. The new file type will appear in the File Types window. Click **OK**.

Editing File Types

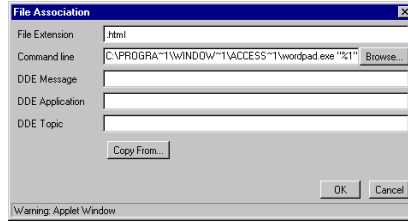
To change the settings for an existing entry:

1. Select **Edit > LaunchPad Setup**. The LaunchPad applet will appear as part of the TeamSite window.
2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.
3. Select the file type you want to change.



LaunchPad applet preferences: File Types tab

4. Click **Change**. The File Association window containing the settings for that file type will appear.



File Association window

5. From the File Association window, you can change settings using the **Copy From** button, as described above, or you can edit them manually. Click **OK**.
6. The edited file type will appear in the File Types window. Click **Done**.

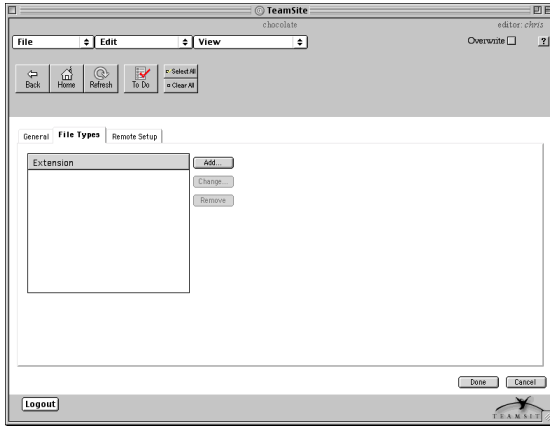
Configuring File Types for Macintosh or UNIX

LaunchPad allows you to associate different applications with different file extensions, so that when you double-click on a file, it knows what application to use to open it. For example, if you plan to edit HTML files, you will need to configure the .html or .htm file type.

Adding a New File Type

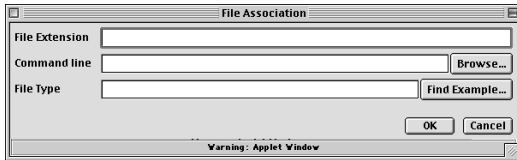
To add a new type of file to your LaunchPad preferences:

1. Select **Edit > LaunchPad Setup**. The LaunchPad applet will appear as part of the TeamSite window.
2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.



LaunchPad applet preferences: File Types tab

3. Click **Add**. An empty File Association window will appear.



File Association window

4. Enter the file extension you want to configure in the **File Extension** box. The file extension must begin with a period (for example, .html, .jpg, .gif).

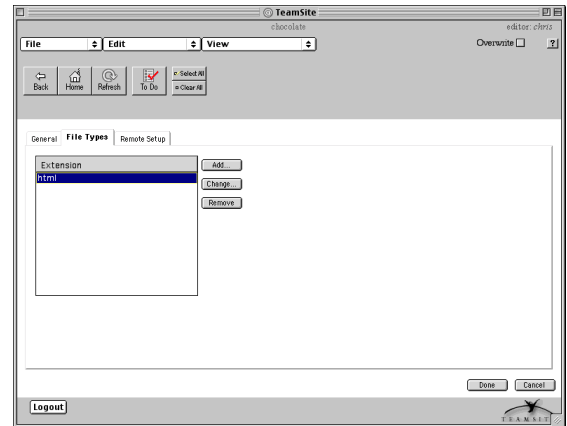
Note: You can only configure one extension per entry. For example, although you might want to use the same editor for .htm and .html files, you would still need to create two different entries.

5. Click **Browse**. In the pop-up window, browse to the location of the application you want to use. Select the application and click **Choose**.
6. Click **OK**. The new file type will appear in the File Types window.

Editing File Types

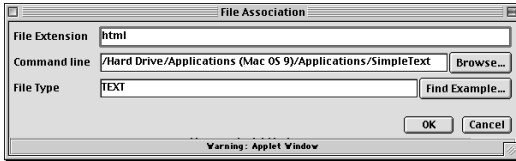
To change the settings for an existing entry:

1. Select **Edit > LaunchPad Setup**. The LaunchPad applet will appear.
2. Click the **File Types** tab. A list of all file types configured specifically for LaunchPad will appear.



LaunchPad applet preferences: File Types tab

3. Select the file type you want to change and click **Change**. The File Association dialog box will appear.



File Association window

4. Click **Browse**. In the pop-up window, browse to the location of the application you want to use. Select the application and click **Choose**.
5. Click **OK**. The edited file type will appear in the File Types window.

Direct Edit: Saving Files Directly to the Server

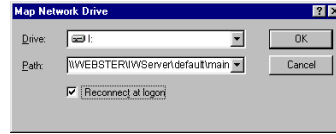
You can use this option if you are using Windows and can access the TeamSite server on your LAN (see below), or if you are using UNIX. Direct Edit is not recommended for Macintosh users.¹

To use Direct Edit:

1. (Windows only)

Using Windows Explorer, map your TeamSite server to a shared network drive. In the Path field, type in the directory for your main branch, for example,
`\\SERVERNAME\IWServer\default\main`.

1. Certain Macintosh applications are incompatible with LaunchPad Direct Edit due to differences in the way they handle file types. Text editors such as BBEdit and SimpleText will usually work with Direct Edit for the Macintosh.

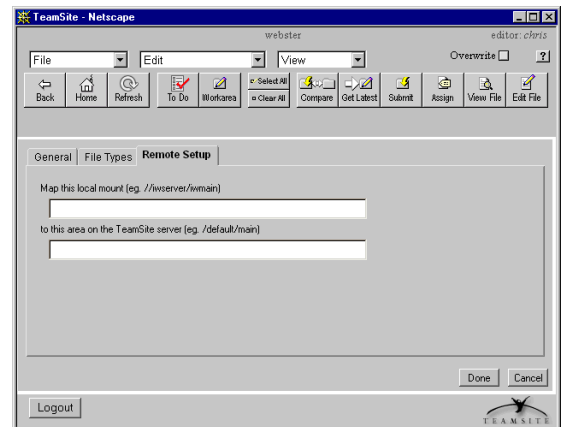


Map Network Drive window

2. (All platforms)

From the TeamSite window, select **Edit > LaunchPad Setup**. The LaunchPad applet will appear.

3. Select the **Remote Setup** tab.



The Remote Setup tab

4. Enter the local path in the “Map this local mount” box.

For example (Windows client)
`I:\branchpath\WORKAREA\workarea name` or (UNIX client) `//iwsrvr/iwmain/branchpath/WORKAREA/workareaname`.

5. Enter the TeamSite path in the “to this area on the TeamSite server” box (for example, /default/main/*branchpath*/WORKAREA/*workareaname*).

Remote Edit: Editing Files on Your Computer

All users can edit files remotely with LaunchPad. You should use this option if you are using a Macintosh, if you are using Windows and cannot access the TeamSite server through a LAN, or if you use multiple TeamSite servers on a regular basis.

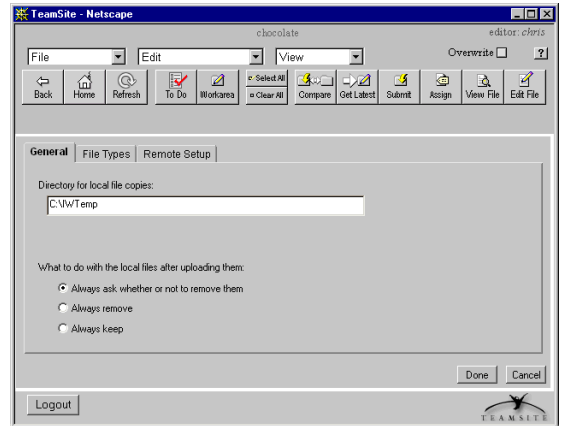
With Remote Edit, when you edit a file, LaunchPad downloads a temporary copy of the file to your local computer. LaunchPad then opens the file in the editing application that you have configured.

When you have finished editing the file, you must tell LaunchPad to upload the temporary copy to the TeamSite server.

Configuring Remote Edit Preferences

You can tell LaunchPad whether to remove or keep the temporary copies of files that you have edited when you upload these files. To set this preference:

1. Select **Edit > LaunchPad Setup**. The LaunchPad applet will appear.
2. Click the **General** tab. This tab allows you to change the directory for TeamSite temporary files. However, if you change this directory, LaunchPad may not work properly.



Setting preferences in the LaunchPad applet

3. Under “What to do with the temporary local files after uploading them,” select the option that best describes the behavior you want.

If you select “Always remove” or “Always keep” LaunchPad will not query you at the time of upload. “Always remove” only removes the temporary copies of files that LaunchPad has downloaded from TeamSite. It will not affect any other copies of the files that you have on your computer. “Always keep” leaves the temporary files on your computer for further use. You may want to use this option if you want to edit the files again after uploading them. If you use this option, you will need to remove the files manually at some point.

4. Click the **Remote Setup** tab and clear both fields.

Using Remote Edit

To edit files on your local computer:

1. From the TeamSite window, select **Edit > LaunchPad Setup**. The LaunchPad applet will appear.
2. Select the **Remote Setup** tab.
3. Clear both fields.

Future edits will download a temporary copy of the file to your computer and automatically open it in the editing application that you have configured LaunchPad to use. You will then need to upload the file for your changes to show up in TeamSite.

If you have closed a file or quit your editing application, and you want to edit the file again:

1. Click the file name in the LaunchPad window.
2. Click **Edit**.
3. The file will open in your editing application.

Using a Different Editing Application



You can also choose a different editing application than the one you have set in your LaunchPad Preferences.

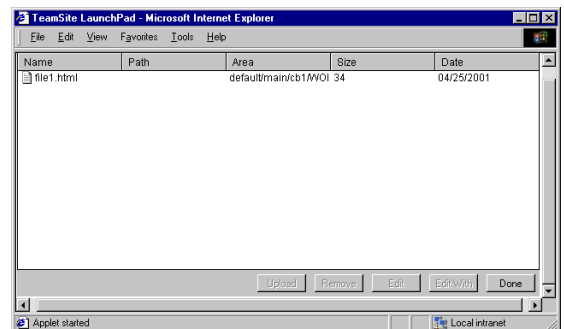
1. Click the file name in the LaunchPad window.
2. Click **Edit With**.

3. A browsing window will appear. Browse your computer until you locate the editing application that you want to use, and click its name.
4. Click **OK**. The file will open in the application that you have chosen.

Uploading Files

LaunchPad permits you to upload the files you have edited to the TeamSite server whenever you are connected to the TeamSite server.

A file that has been edited since it was last uploaded will be displayed in the LaunchPad window with a  (Changed) icon. A file that has not been edited, or that has been uploaded since it was last edited, will be displayed with an  (Unchanged) icon.



Viewing local files through the LaunchPad applet

To upload files:

1. Save your changes.

2. In the TeamSite GUI, select **View > List Local Files** and click the names of the files you want to upload.
3. Click **Upload**.
4. A dialog box will appear asking if you want to delete the copy of the files on your hard disk. If you want to continue editing the files, click **Keep**. If you are finished with the files, click **Remove**. To cancel the operation and close the dialog box, click **Cancel**.
5. TeamSite will upload the files you have just edited to the TeamSite server.

If you are finished with the files that appear in the LaunchPad window and do not want to upload them, you can delete them from your hard disk without uploading them first.

1. Click the file names in the LaunchPad window.
2. Click the **Remove** button.

Click **OK**. TeamSite will log you out and return you to the login screen.

Logging Out of TeamSite

When you have finished your work and want to log out of TeamSite, click the **Logout** button in the lower left corner of the TeamSite window. A confirmation dialog box will appear.



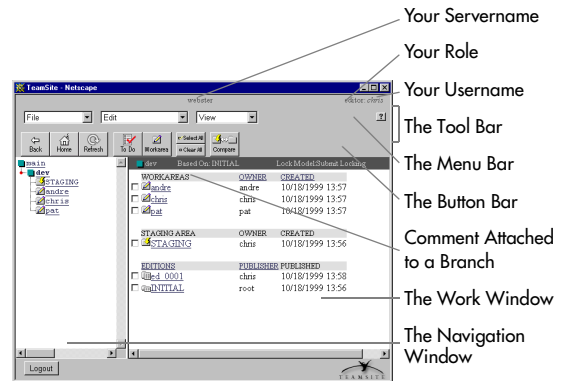
Logout Confirmation window

About the TeamSite GUI

TeamSite has two main views: the Workflow view, which displays information about jobs and tasks, and the Branch view, which allows you to navigate through TeamSite areas. In the Workflow view, you can learn about your jobs and tasks by clicking the **To Do** button in the Button Bar. To view the details of an individual job or task, click its underlined name.

You can move from the Workflow view to the Branch view by clicking the **Workarea** button in the Button Bar. TeamSite will display a list of branches and workareas to which you have access. To navigate into a branch or workarea, click its name. The TeamSite window will display the Branch view.

In the Branch view, the left-hand pane (the Navigation Window) allows you to navigate through TeamSite. The right-hand pane (the Work Window) will be updated as you navigate through the system. The top of the screen contains a Button Bar that has buttons for the most frequently used commands, and a Menu Bar that has drop-down menus for all TeamSite commands. To return to the Workflow view, click the **To Do** button in the Button Bar.



The TeamSite window, displaying a branch view

About TeamSite Workflow

TeamSite workflow contains two major elements: jobs and tasks.

A *job* is a set of interdependent tasks. Each job describes the particular route that the workflow needs to take.

A *task* is a unit of work performed by a single user or process. Each task in a job is associated with a particular TeamSite workarea and carries a set of files with it.

TeamSite workflow begins when a user creates a job. The user who creates the job specifies the parameters of this job, such as the users who are to perform specific tasks, the workarea a task is to take place in, and the files associated with a task.

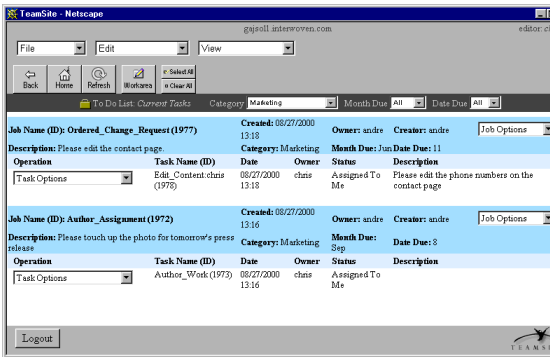
The users who are assigned specific tasks may be notified by email (depending on your

system’s configuration) or by checking their Task list in the TeamSite GUI.

When users complete tasks, they send the tasks to the next step of the workflow process by selecting a task transition. If the task is a decision point, they will need to select from the possible transitions.

Using the TeamSite Workflow View

The TeamSite Workflow view allows you to track your current jobs and tasks, to see the history of a job, and to see what files make up a task. To see jobs and tasks that you own, click the **To Do** button in the Button Bar. To further refine this view, select one of the options in the **View** menu, or use one of the attribute menus in the dark gray bar to filter your view.



A Task list

To go to the Branch view, click the **Workarea** button in the Button Bar.

Using the TeamSite Branch View

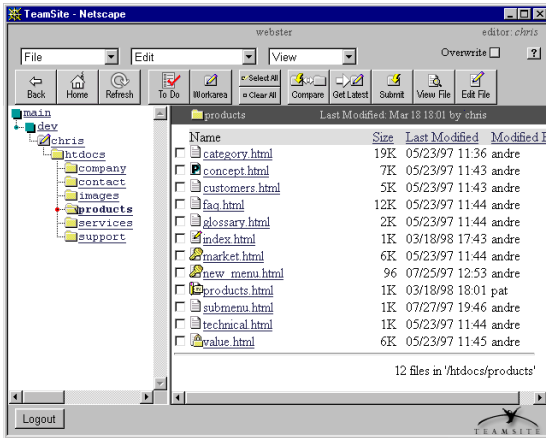
The right-hand side of the TeamSite window (the Work Window) contains a list of files and workareas. When you are in a workarea, the left-hand side (the Navigation Window) helps you to navigate. To go into a workarea, click its name.

You can work with files only in the Work Window. To see the contents of a workarea, directory, or file, click its name or icon (files will display in a new browser window). To perform any other operation on a file or directory, select the check box next to the file or directory’s name, then select the action you want to perform from one of the buttons or menus in the Tool Bar.

In a workarea, files and directories may be displayed with several different icons. Each icon contains information about that file or directory’s status. See “TeamSite Icon Reference” on page 43 for a complete list of TeamSite icons.

You may sometimes need to refresh the Work Window to see changes that have been made. To do this, click the name of your current directory in the Navigation Window, or click the **Refresh** button in the Button Bar.

To return to the Workflow view, click the **To Do** button in the Button Bar.



A workarea containing modified, assigned, locked, and private files

Setting Your Home Page

To set your Home page:

1. In the TeamSite GUI, navigate to the location or workflow view that you want to go to automatically when you first log in.
2. Select **Edit > Set Home Page**.

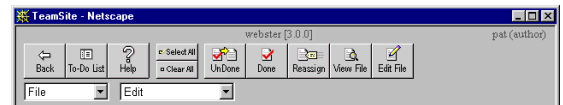
Your Home page setting will be stored on the TeamSite server. You can change this setting at any time, or reset it to the default setting. If you change the name of the path to your Home page (that is, if you rename a directory in the path), you will need to set your Home page again.

To reset your Home page to the default setting, select **Edit > Reset Home Page**.

TeamSite GUI Elements

The Tool Bar

The Tool Bar consists of a Button Bar that contain the most frequently used commands, and a Menu Bar that displays drop-down menus containing all available commands. Various commands are displayed in the Menu Bar and Button Bar at different times according to when you can use them.

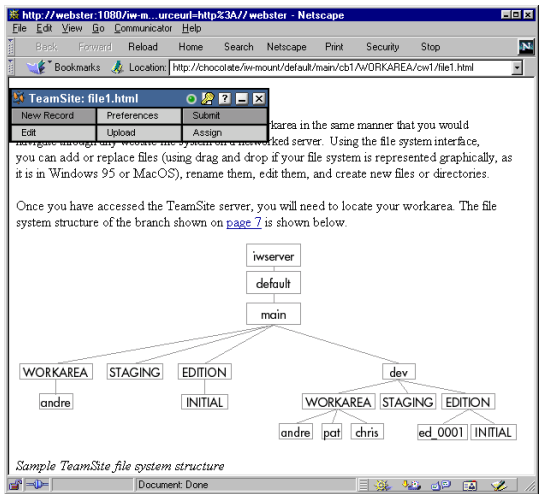


Author's Tool Bar

The Menu Bar contains three drop-down menus: **File**, **Edit**, and **View**. Each menu is displayed only when you can use at least one of the commands that it contains. Individual commands within the menus are displayed only when you can use them. Your TeamSite server may have some custom menu items not described in this manual.

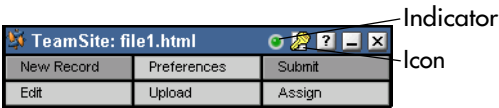
The SmartContext Editing Tab

When you click the name of a file in the TeamSite GUI, the file will appear in a new browser window containing the TeamSite SmartContext Editing tab. This tab displays information about the current status of the file shown in the browser window. The buttons on this tab allow you to edit the current page.



A browser window with the SmartContext Editing tab

The SmartContext Editing tab contains an icon and an indicator which tell you about the file’s status. The icon tells you whether the file has been modified or locked. The indicator tells you whether or not you can edit the file.



The SmartContext Editing tab


Indicator	Status
Black	You cannot modify this file; it is locked or you do not have permission.
Green	You can modify this file.
Yellow	You can modify this file, but a newer version is in the staging area.
Red	You can modify this file, but it is in conflict with the staging area.

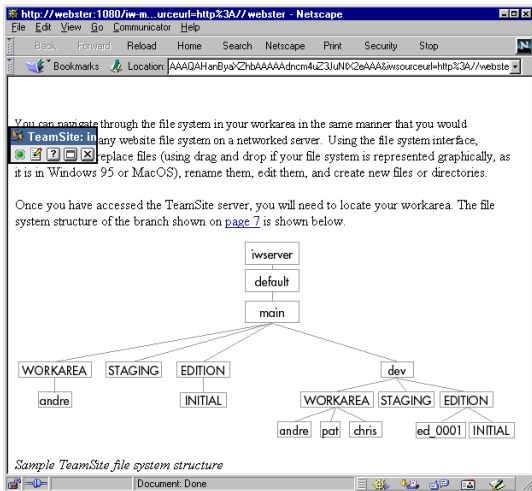
To learn more about the file’s status, move your mouse arrow over the icon. A ToolTip will appear with more detailed information.

The SmartContext Editing tab contains several buttons. You can configure which buttons appear through the Preferences button. For more information about configuring the SmartContext Editing tab, see “Setting Tab Preferences” on page 60.


Minimizing the SmartContext Editing Tab

If you don't need to use the SmartContext Editing tab, you can minimize it to reduce its size and loading time. To minimize the SmartContext Editing tab, open the tab and


click the  (Minimize) button. The minimized version of the tab will replace the full version of the tab.



A browser window with the minimized SmartContext Editing tab

To reopen the SmartContext Editing tab, click the  (Maximize) button on the minimized tab.

Closing the SmartContext Editing Tab

To close the SmartContext Editing tab, click the  (Close) button on the tab. To get it back, click the **Back** button in your browser, or return to the TeamSite GUI and click the name of a file.

Moving the SmartContext Editing Tab

To move the SmartContext Editing tab, click on the blue title bar and drag it to where you want it to be.

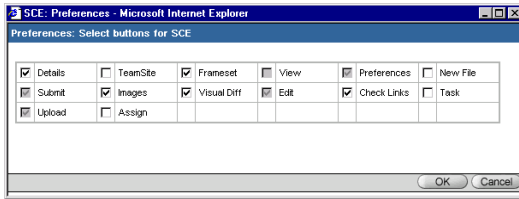
SmartContext Editing and LaunchPad

When you are using SmartContext Editing, if you have LaunchPad set to use Remote Edit, you should configure your LaunchPad to **Always Remove** uploaded files (see page 54). If you do not set this option, the LaunchPad window will rapidly fill up with the files that you edit, and they will not be automatically removed. You can, however, remove these files manually.

Setting Tab Preferences

You can configure which buttons appear in the SmartContext Editing tab. To choose which buttons appear:

1. Click the **Preferences** button in the SmartContext Editing tab. The Preferences window will appear.



The SmartContext Editing Preferences window

- Click the check boxes for the buttons you want to appear on the tab. Unavailable selections will be grayed out.

The Casual Contributor Interface

The Casual Contributor Interface allows you to click on links in Web pages that will take you to a specific part of the TeamSite GUI. Possible actions are:

- Edit—opens a file for editing.
- SCE—opens a file in a browser for use with SmartContext Editing.

If you have logged in to TeamSite recently enough that your authentication has not expired, you will be taken directly to the appropriate page or part of the TeamSite GUI. Otherwise, you will have to log in again. If you are using WebDesk, you will then be taken to the appropriate part of the TeamSite GUI. If you are using WebDesk Pro, you will be taken to your Home page. The amount of time you have before your authentication expires is configurable by your site administrator.

The appearance and placement of these links is configured on a site by site basis. Consult your site administrator for more information.

Editing Files

You can edit files in your Task list, or you can navigate into an Editor's workarea to edit files. A new task will be created if you edit a file that is not already in one of your tasks.¹ When you complete this task, the file will be returned to the owner of the workarea for approval.

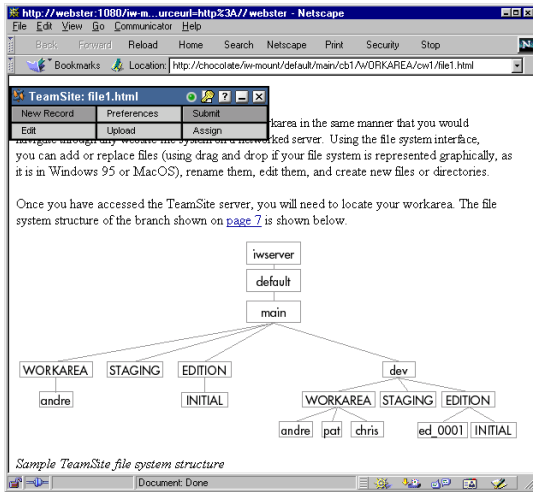
TeamSite allows you to edit files from the TeamSite GUI in two ways: through SmartContext Editing, where you browse the Web site and edit pages as you view them, or through the main TeamSite GUI, where you browse the directory structure of the Web site and edit individual files.

Using SmartContext Editing

Editing Files Through SmartContext™ Editing

- To edit a file using TeamSite SmartContext Editing, click the name of a file in the Work Window or a Task Details window in the TeamSite GUI. The file will open in a new browser window containing the TeamSite SmartContext Editing Tab.
- Navigate through the Web site by clicking links until you reach the page you want to edit.

1. This describes the default workflow for Authors. Your system may be configured to allow a different workflow process. For more information on workflow and tasks, see page 14 and page 29.



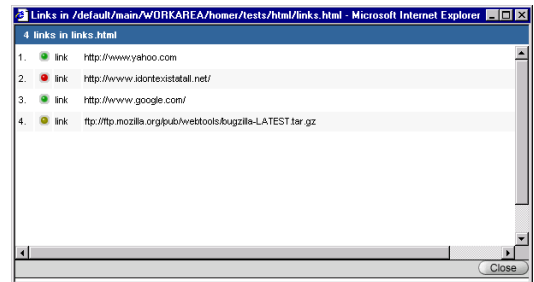
A browser window with the SmartContext Editing tab

- Click the **Edit** button on the tab. The file will open in your editing application.
- Edit the file as you normally would. Save the file when you are finished editing it.
- To see the changes you made, return to the SmartContext Editing window and click the **Refresh** button on the pulled-out tab. Your changes will be uploaded at this time.

Checking Links with SmartContext Editing

To check links in your current page:

- If the **Check Links** button does not appear in the SmartContext tab, use the Preferences button to add it (see “Setting Tab Preferences” on page 60).
- Click the **Check Links** button. The Links window will appear.



The Links window

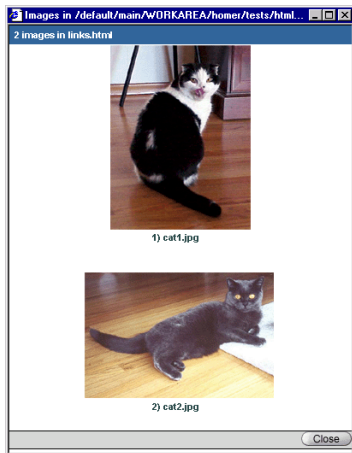
- This window shows the status of the links that appear on the current page:

Green	The link works.
Red	The link is broken .
Yellow	The link can't be validated as either correct or broken by this link checker.

Editing Images with SmartContext Editing

To edit the images that appear in a page:

1. If the **Images** button does not appear in the SmartContext tab, use the Preferences button to add it (see “Setting Tab Preferences” on page 60).
2. Click the **Images** button on the tab. An Images window will appear, containing all the images that appear on the page.



The Edit Images window

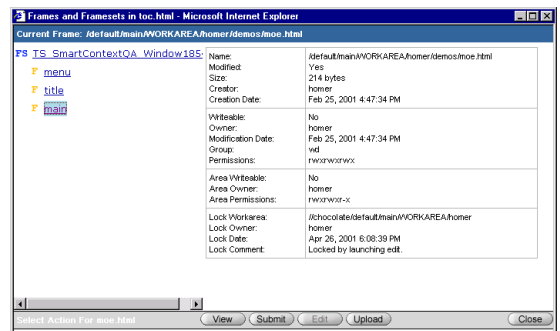
3. In the Images window, click the image you want to edit. A new window will appear, displaying the image and the SmartContext Editing tab.
4. Edit the file using SmartContext Editing (see page 61). Save the file when you are finished editing it.

SmartContext Editing and Framesets

If you are editing a frame-based page, a SmartContext Editing tab will appear in each frame so that you can select which file to edit. However, you can also edit the frameset file itself.

To edit a frame-based page's frameset file:

1. If the **Frameset** button does not appear in the SmartContext tab, use the Preferences button to add it (see “Setting Tab Preferences” on page 60).
2. Click the **Frameset** button on the tab. The Frames and Framesets window will appear with a list of the frameset file and all the files it contains. Frameset files are marked with an FS; files contained within the frameset are marked with an F.



The Frames and Framesets window

- To get information about any of the files listed, click its name.
- To edit one of the files, click its name, then click **Edit**.

- To submit one of the files, click its name, then click **Submit**.
- To view one of the files in its editing application, click its name, then click **View**.
- To upload one of the files you have edited to TeamSite, click its name, then click **Upload**. This will do the same thing as the Upload button in LaunchPad (see “Uploading Files” on page 54).

Editing Files Through the TeamSite GUI

To edit a file through the main TeamSite GUI using your default editing application:

UNIX users:

1. In the TeamSite GUI, navigate to the directory containing the file you want to edit.
2. Click the check box next to that file.
3. Click the **Edit File** button in the Button Bar or select **Edit > Edit File**.
4. The file will open in your editing application. Edit the file as you normally would. If you are using Direct Edit, the file will be saved to the TeamSite server each time you save it. If you are using Remote Edit, your changes will not be uploaded until you quit your editing application.

Macintosh and Windows users:

1. In the TeamSite GUI, navigate to the directory containing the file you want to edit.
2. Click the check box next to that file.
3. Click the **Edit File** button in the Button Bar or select **Edit > Edit File**.

If you are using LaunchPad’s Direct Edit feature (see page 52), changes will appear on the server as soon as you save them. If you are using Remote Edit (see page 53), a temporary version of the file will be downloaded to your computer, and its name will appear in the LaunchPad window. Changes will not appear until you upload the files from LaunchPad.

4. The file will open in your editing application. Edit the file as you normally would. If you are using Remote Edit, you will need to upload the file from LaunchPad after you have saved it.

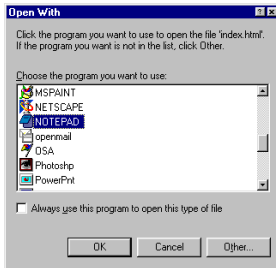
Editing Files With an Alternate Application

To edit a file using an alternate editing application:

Macintosh and Windows users only:

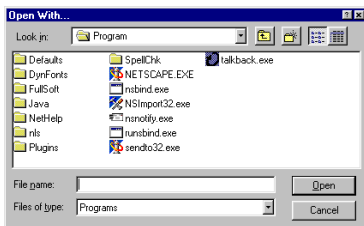
1. Navigate to the directory containing the file you want to edit. Click the check box next to that file.
2. Select **Edit > Edit With**.

An Open With window will appear. Select the editing application you want to use from the list displayed.



The Open With window

If you cannot find the application you want to use, click the **Other** button and navigate to the location of the editing application. Click **Open**.



Locating an editing application

- The file will open in your editing application. Edit the file as you normally would. If you are not using Direct Edit, you will need to upload the file from LaunchPad after you have saved it.

Viewing Your Work

Browser View

To view a file within the context of the Web site, click its underlined filename within a workarea, staging area, or edition. The file will appear in a new browser window. You may need to refresh your browser to see changes immediately.

To view your work in context, you may want to view the main page and navigate through the Web site as a visitor would.

If you need to see the end of the page's URL (for example, if you need to see the name of the displayed file), click the browser's **Location** text box, then press the **End** key. To return to the beginning of the URL, press the **Home** key.

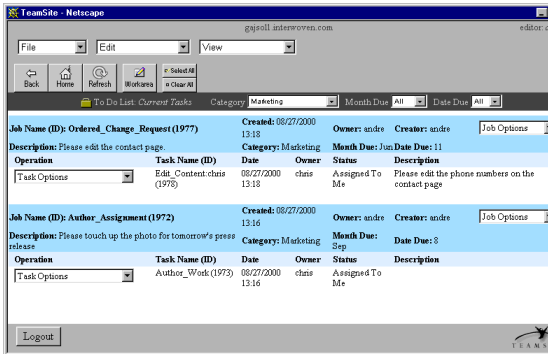
Source View

To view a read-only copy of a document in your preferred editing application, click the check box next to that file, then click the **View File** button in the Button Bar or select **Edit > View File**. A read-only copy of the file will be opened in your preferred editing application. You will be able to edit this copy, but you will not be able to save any changes you make to the TeamSite server.

Managing Tasks

Viewing Your To Do List

To see which tasks and jobs you own that are currently pending, click the **To Do** button in the Button Bar. TeamSite will take you to the To Do list in the Workflow view and show you all the tasks and jobs that are assigned to you.



A To Do list

The To Do list gives you two new menus: **Job Options** and **Task Options**. These menus allow you to get further information on tasks or jobs, perform tasks (see “Performing Tasks” on page 66), edit tasks (see “Editing Tasks” on page 68), or complete tasks (see “Completing Tasks” on page 71).

Performing Tasks

TeamSite workflow includes many kinds of tasks. Tasks may require you to add files to the task, edit files or set metadata, or they may be performed by external programs that require

no user input. Some tasks may require review and approval or rejection (these tasks are often marked as read-only).

To perform a task, select **Task Options > Start Task**. If the task involves file operations such as editing or adding files, or task operations such as approving files, the Task Files window will appear. Do these things as described elsewhere in this manual (see page 66 for information on editing files, page 68 for information on adding files, and page 71 for information on approving tasks). When you are finished, you will need to complete the task (see page 71).

Tasks performed by external programs often do not require user input, and may run invisibly to the user. Some automated tasks may require user input, in which case a separate form will appear when needed for data entry. When you select **Task Options > Start Task**, the task window will appear. Enter information as it directs you.

Editing Task Files

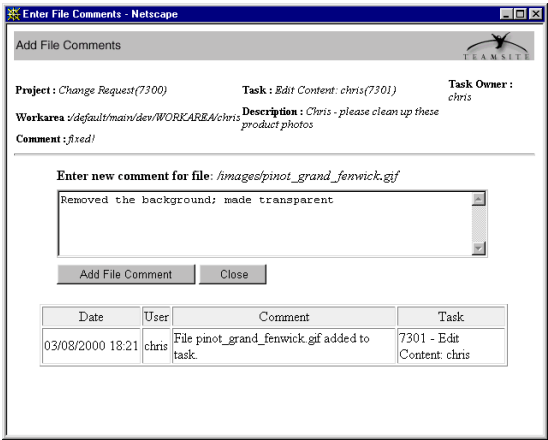
To edit a file in a task, go to the Task Details page (select **Task Options > Start Task** from your To Do list). Locate the file you want to edit, and select **File Options > Edit File/Data Record**. Edit the file as described in “Editing Files” on page 61.

Adding Comments to Task Files

At any point in a task, you can add information in the form of comments on the files contained in the task. These comments may convey information to other users involved with the job, such as content contributors or approvers.

To add a comment to a task file:

- 1. Go to the Task Details page (select **Task Options > Edit Task** from your To Do list).
- 2. Locate the file you want to add the comment to. Select **File Options > Edit Comment**.
- 3. The File Comments page will appear, containing a list of the task's existing comments at the bottom of the page, and a text box at the top of the page. Enter your comments in the text box and click **Add File Comment**.
- 4. You will be returned to the File Comments page, where you can enter another comment. To exit this page, click the **Close** button.



The File Comments page

Renaming Task Files

To rename a file in one of your tasks:

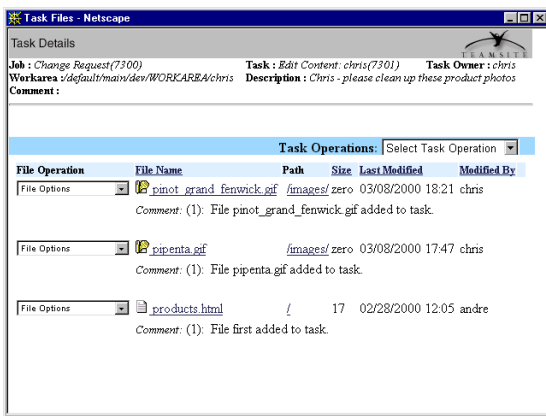
- 1. Go to the Task Details page (select **Task Options > Edit Task** from your To Do list).
- 2. Locate the file whose name you want to change. Select **File Options > Rename**.
- 3. A dialog box will appear. Type the new name into the space provided. Click **OK**.

The file will appear in the Task Details page with the new name. A deleted file with the old name will also appear in the Task Details page, for future submission to the staging area.

Editing Tasks

To view task information or edit tasks:

1. Go to your To Do list and locate the task you want to view.
2. Select **Task Options > Edit Task**. The Task Details window will appear.



The Task Details window

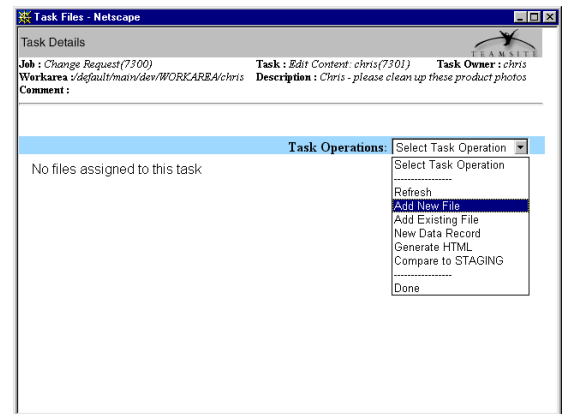
In this window, you can perform file operations and task operations. File operations include editing task files, removing task files, and adding comments to task files. Task operations include adding and removing files from tasks, adding comments to tasks, and completing tasks.

Adding and Removing Files from Tasks

Adding a New File to a Task

To add a new file to a task:

1. In your To Do list, select **Task Options > Edit Task**.
2. The Task Details window will appear. Select **Task Operation > Add New File**.



Adding new files to a task

3. A New File window will appear. Enter the name of the new file and, if necessary, navigate to the directory where you want to put the file. Select the type of template you want to use (if you do not want to use a template, make sure Plain File is selected), and select the specific template you want to use. Click **OK**.
4. The file will be added to the task, and it will open in your editing application.

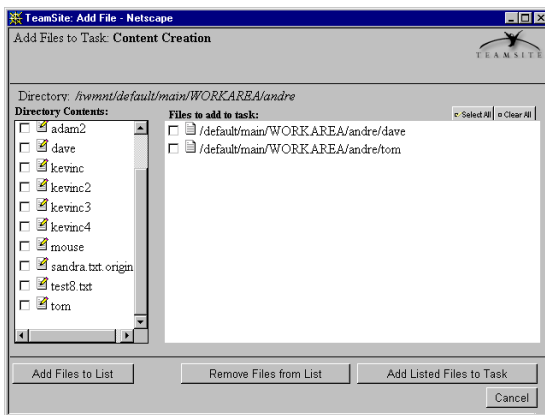
This file will not be visible in the Task Details window until you select **Task Operation > Refresh**.

Adding Existing Files to a Task

To add existing files to a task:

1. In your To Do list, select **Task Options > Edit Task**.
2. The Task Details window will appear. Select **Task Operation > Add Existing File**.
3. The Add Files to Task window will appear. Use the left-hand pane to locate the file or files you want to add to the task. When you have located them, check the check boxes next to them and click **Add Files to List**. They will appear in the right-hand pane.

If you add files to the list in error, click the check boxes next to the files you want to remove in the right-hand pane and click **Remove Files from List**.



The Add Files to Task window

4. When the list in the right-hand pane contains all the files you want to add to the task, click **Add Listed Files to Task**. The files will be added to the task.

Removing Files from Tasks

To remove files from a task:

1. In your To Do list, select **Task Options > Edit Task**.
2. The Task Details window will appear. Locate the file you want to remove, and select **File Operation > Remove From Task**.
3. A confirmation box will appear; click **OK**.
4. The file will be removed from the task.

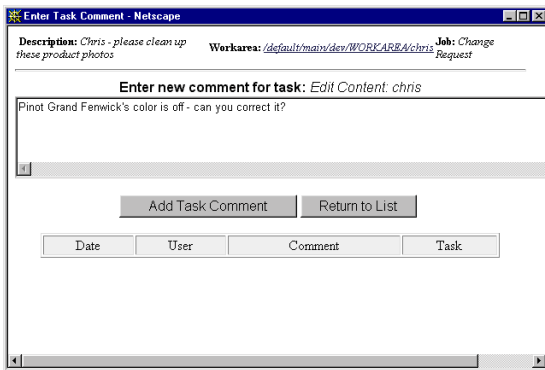
Adding Comments to Tasks

At any point in a task, you can add information in the form of comments. These comments may convey information to other users involved with the job, such as content contributors or approvers.

To add a comment to a task:

1. Go into your To Do list (click the **To Do** button in the Button Bar).
2. Locate the task you want to add the comment to. Select **Task Options > Add Task Comment**.

3. The Task Comments page will appear, containing a list of the task's existing comments at the bottom of the page, and a text box at the top of the page. Enter your comments in the text box and click **Add Task Comment**.
4. You will be returned to the Task Comments page, where you can enter another comment. To exit this page, click the **Return to List** button.



The Add Comments page

Editing Task Descriptions

To change the task description that appears in your To Do list:

1. Go to your To Do list (click the **To Do** button in the Button Bar).
2. Locate the task whose description you want to change. Select **Task Options > Change Description**.

3. A dialog box will appear. Type the new description into the space provided. Click **OK**.

The new task description will appear in your To Do list.

Renaming Tasks

To rename a task that appears in your To Do list:

1. Go to your To Do list (click the **To Do** button in the Button Bar).
2. Locate the task whose name you want to change. Select **Task Options > Rename**.
3. A dialog box will appear. Type the new name into the space provided. Click **OK**.
The new task name will appear in your To Do list.

Approving Tasks

Approval tasks require you to review the files, and then approve or reject them. To approve or reject the task, select the appropriate successor option (see "Completing Tasks" on page 71). Confirmation of your choice will appear in the TeamSite window.

Completing Tasks

When you have completed a task, select a transition to move the job along the workflow process.

To select a transition:

1. Go to the Task Details page (select **Task Options > Edit Task** from your To Do list).
 2. Select the **Task Operation** menu. All possible task transitions will appear at the bottom of the menu. These transitions will vary from task to task. Some common transitions are **Approve**, **Reject**, and **Done**.
 3. Select a transition.
2. Locate the task you want to own. Select **Task Options > Take Ownership of Task**.
 3. The task will now appear in your To Do list.

The job will now move on to the next task. The task will appear in your To Do list with an updated status.

Some tasks may be retrieved after you have selected a transition (this is only possible if the next task has not been activated). If you want to take a task back, go to your To Do list and select **Task Options > Take back task** (if available). If this menu option is not available, then this task cannot be retrieved.

Taking Ownership of Tasks

You can only take ownership of group tasks, which are created without a specific owner. These tasks will say <no user> in the Owner column of the Job History window.

To take ownership of a task:

1. Go to your To Do list (click the **To Do** button in the Button Bar). Select **View > Unassigned Tasks**.

Managing Files

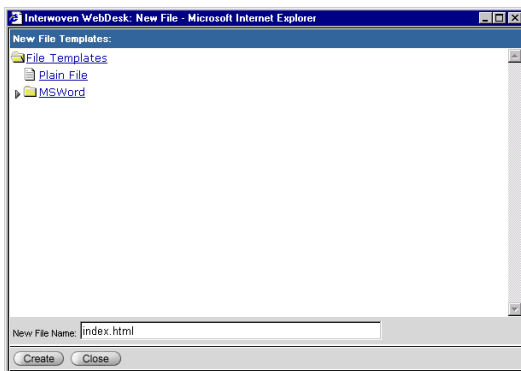
Creating New Files

You can only create new files in directories where you have write permissions.

To create a new file in a workarea where you have access:

1. Go into the workarea by clicking its name.
When you are in a workarea, the **New File** command will appear in the **File** menu.
Within the workarea, navigate to the directory where you want to place the new file.
2. Select **File > New File**. The New File dialog box will appear.

In the New File dialog box, if the current directory location is not where you want to put the new file, navigate to the directory where you want to put the file.



The New File window

3. Select the type of template you want to use, then select the specific template that you want to use. If you do not want to use a template, select **Plain File**.
4. In the **New File Name** box, type the name of the file you want to create. You will need to include the suffix (that is, *file-name.html*). Do not use the following characters in filenames:
`\ / : * ? " < > |`

If a file with the same name exists in another workarea and is locked, you will not be able to create the file. If a file with this name exists in the staging area, you will be asked whether you want to create a new file or bring a copy of the file in the staging area into your workarea. Follow the directions in the dialog boxes that appear.

5. Click **Create**.

UNIX users: The file will open in the application associated with its file extension. Edit the file as you normally would, and save your changes. If you are using Direct Edit (see page 52), the file will be saved to the TeamSite server each time you save it. If you are using Remote Edit (see page 53), your changes will not be uploaded until you quit your editing application.

Windows and Macintosh users: The file will open in the application associated with its file extension. If you are using Direct Edit (see page 52), changes will be saved to the

TeamSite server when you save the file. If you are using Remote Edit (see page 53), its name will appear in the LaunchPad window, and you must upload it after you save it.

Creating New Directories

You can only create directories inside directories where you have write permissions.

To create a new directory in a workarea where you have access:

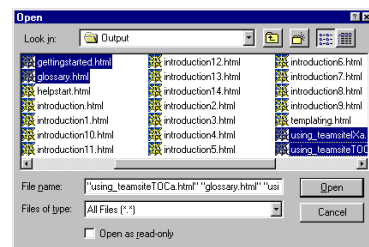
1. Go into the workarea by clicking on its name. Within the workarea, navigate to where you want to place the new directory. When you are in a workarea, the **New Directory** command will appear in the **File** menu.
2. Select **File > New Directory**. A dialog box will appear, asking you to enter the name of the new directory.
3. Type the name of the directory you want to create. Do not use the following characters in directory names:
\ / : * ? " < > |
4. Click **OK**. An empty directory will be created.

Importing Files Into Your Workarea

TeamSite lets you import files residing on your hard drive into the TeamSite system.

Windows 95, 98, NT, or 2000 Client

1. Select **File > Import Files**.
2. LaunchPad will open, and a Select File window will appear. In the Select File window, navigate to the directory containing the files you want to import. Select the files (hold down the shift key to select multiple files) and click **OK**.



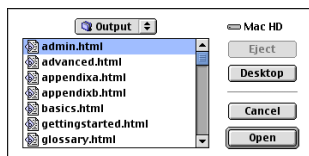
The Select File window

The files will be uploaded to TeamSite.

If you want to import files that have the same names as existing files, click the **Overwrite** button before selecting **File > Import Files**. The files in your workarea will be overwritten by the imported files with the same names.

Macintosh Client

1. Select **File > Import Files**.
2. LaunchPad will open, and a Select File window will appear. In the Select File window, navigate to the file you want to import. Select the file and click **OK**.



The Select File window

3. The Select File window will reappear. Continue to select files to import, clicking **OK** after each one. When you are finished selecting files, click **Cancel**. The files will be uploaded to TeamSite.


If you want to import files that have the same names as existing files, click the **Overwrite** button before selecting **File > Import Files**. The files in your workarea will be overwritten by the imported files with the same names.

Renaming Files

The TeamSite Rename command gives a file a new name, but does not change the directory path to the file. If you want to both rename and move a file, you must use the Move command.

You can only rename files if you have write permissions for the directory containing the files.

To rename a file:

1. Select the check box next to the name of the file that you want to rename.
2. Select **File > Rename**.
3. A dialog box will appear. Type the new name (not the full path) of the file, including extension. You should avoid using the following characters in the file's name:
\ / : * ? " < > |
4. The file will appear in the workarea with a  (Modified) icon.

Renaming a file actually creates a new file with the new name and deletes the old file. The version history of the file will keep track of the name change—older versions of the file will not be lost.

Moving Files


To move a file from one directory to another:

1. Select the check box next to the name of the file that you want to move.
2. Select **File > Move**.
3. A dialog box will appear asking you for the new name or path. Type the full path of the directory where you want the file to be moved to. Be sure to include the file name in the path. You can use an absolute path (rooted in the workarea's root directory) or a relative path, and you can change the name of the file.

`/htdocs/products/index.html`
would specify an absolute path.

`products/index.html` would specify a relative path.

`../support/index.html` would specify a relative path.

4. The file will appear in the new location with a  (Modified) icon.

The version history of the file will keep track of the change in location—older versions of the file will not be lost.

Copying Files


To copy a file from one directory to another:

1. Select the check box next to the name of the file that you want to copy.
2. Select **File > Copy**.
3. A dialog box will appear asking you for the new name or path. Type the full path of the directory where you want the file to be copied. Be sure to include the file name in the path. You can use an absolute path (rooted in the workarea's root directory) or a relative path, and you can change the name of the file.

`/htdocs/products/index.html`
would specify an absolute path.

`products/index.html` would specify a relative path.

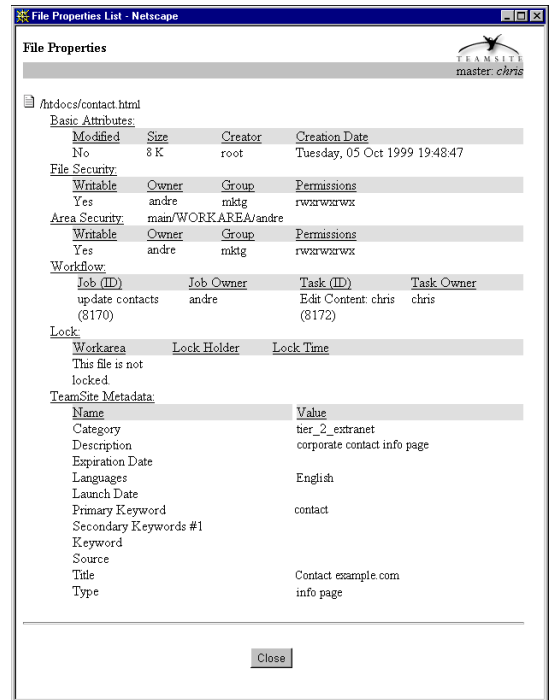
`../support/index.html` would specify a relative path.

4. A copy of the file will appear in the new location with a  (Modified) icon.

Viewing File Properties

TeamSite’s File Properties feature allows you to determine basic file properties such as:

- The size of a file.
- When it was created and by whom.
- Whether you have write access to it.
- What the permissions are (what users and groups have access to it).
- Whether you have access to the area it resides in.
- The owner and group for that area.
- Whether it is locked (and by whom and in which workarea).
- Whether it is part of a task.
- What comments and metadata are currently attached to it.



The File Properties window

To view the properties of a file:

1. Select the check boxes next to the files whose properties you want to view.
2. Select **File > File Properties**.
3. The File Properties window will appear.

Look in this window to find the properties you’re most interested in.

About the File Properties Window***Basic***

Modified	Tells whether the file has been modified in the current workarea.
Size	Size of the file.
Creator	Username of the creator of the file.
Creation Date	Date the file was created.

File Security

Writable	Tells whether you can write to the file.
Permissions	Access permissions for the file in Windows NT notation.
Owner	Owner of the file (according to Windows NT permissions).

Area Security

Writable	Tells whether you can edit files in the current workarea.
Permissions	Access permissions for the workarea in Windows NT notation.
Owner	Owner of the workarea.
Group	Group which has access to the workarea.

Workflow

Job (ID)	Name and ID of the job (if any) associated with this file.
Job Owner	Username of the owner of the job (if any) associated with this file.
Task (ID)	Name and ID of the task (if any) associated with this file.
Task Owner	Username of the owner of the task (if any) associated with this file.

Lock

Workarea	Workarea (if any) in which the file is locked.
Lock Holder	Username of the lock owner.
Lock Time	Time the file was locked.

Metadata

Metadata that has been set on this file. Metadata will vary from site to site and from file to file.

Searching Metadata

Metadata search may or may not be implemented on your system.

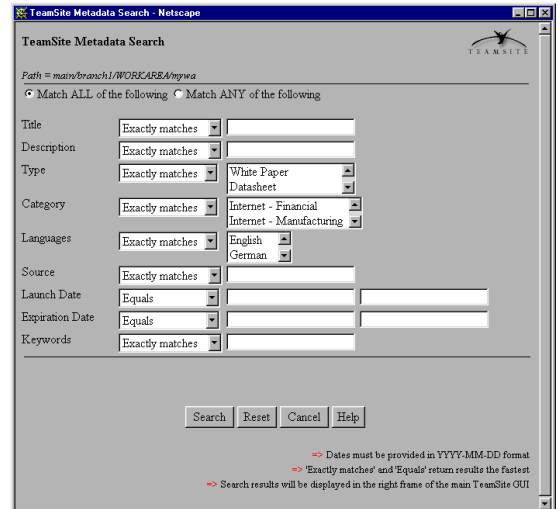
You can search for files based on metadata set for them. For instance, if a file's metadata categorizes it as a "Press Release" and associates the key words "July" and "Acquisition" with it, then a search based on any one or any combination of those values retrieves that file (provided that document type and keywords are configured as searchable attributes).¹ A metadata search must be conducted within a workarea and is recursive through the selected directory and its subdirectories. Text fields in search forms are case-sensitive.

To search metadata through the TeamSite GUI:

1. Within your workarea, navigate to the directory where you want to begin your search.
2. Select **View > Search Metadata** (located past the third separator in the menu).

The TeamSite Metadata Search window appears in a new browser window.

¹ Note that some metadata attributes may be set by your administrator as non-searchable. Therefore, the fact that you can set a particular metadata attribute on a file does not necessarily mean you can search against that attribute.



TeamSite Metadata Search Window

3. Decide whether you want your search to match all or any of your criteria and select the appropriate radio button at the top of the TeamSite Metadata Search window.
4. Set the criteria for your search. You may set just one or several search criteria. Focus your search by selecting operators from the drop-down menus. Also, remember that text fields are case-sensitive.

Note that dates must be entered in YYYY-MM-DD format with dashes between year, month and day. Also, when you use the **Between** operator for a numerical range, you must enter a starting value in the first field and an ending value in the second. When you use operators other than **Between** you need only enter a value in the first field.

5. When you have set your criteria, click **Search**.

The results appear in the right frame of the main TeamSite GUI. Although the results appear in order by file name, be aware that regardless of where you initiate your search the relative path from the workarea to the file is included in the file name. For example, a search hit that retrieves a file named `Zeus.html` in a directory named `Apollo` in a workarea named `Janus` displays the file as `/Apollo/Zeus.html` even if the search was initiated in the `Apollo` directory.

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